Turning 65

Hi, Mr/Mrs\_\_\_\_\_\_\_\_\_\_ Can you hear me ok? Great!

Well, I am calling form Florida Benefits, I know you don’t know me but I will be very brief… I am calling in regards to your (or husband/wife) upcoming enrollment into Medicare.

Have you picked out a Medicare supplement plan?

(If they say yes, hang up the phone and move on)

If they say no, say:

Are you planning on staying on a group, work benefits or employer, or Tricare plan after you turn 65?

(If they say yes, hang up the phone and move on)

If they say no, say:

Well, we are a local Florida brokerage and we specialize in helping clients with their Medicare choices. We are an independent agency and all of our services are 100% free to you.

What I would like to do is give your information to one of our Medicare specialists so he can go over all your options.

The process does not take much time at all.

Ok Great. This call will be recorded for quality purposes (start recording)

In order for the agent to provide you with the best information when they contact you I just need to ask you a few questions

* How old are you?
* What is your first name?
* What is your last name?
* Do you use tobacco or smoke?
* For security purposes, what is your favorite hobby (or color)?
* Is the number I called you on the best number to be reached?
* Can I verify your address?

3-Way

Can you please hold while I connect you with a local agent to provide you with the information? This should only take about 5 minutes. He has been in the industry for many years and will be able to provide you with the best programs and rates available in the industry and then mail the information to you.

Set Face-to-Face Appointment

Since you are on the phone, I would like to schedule a time for the local representative \_\_\_\_\_\_\_\_\_\_ to provide an overview of what your options are which will only take around 20 minutes. He has been in the industry for many years and will be able to provide you with the best programs and rates available in the industry, They have him scheduled to be in your area on and . Which day is best for you?

Now do you prefer morning or evening?

Morning: Would :00 be ok?

Evening: What is evening to you? Sometime earlier around 5:00 or later around 7:00? Would be OK?

Will your spouse be present? (If no – find another day/time when both are available)

I have your address as \_\_\_\_\_\_\_\_\_\_\_\_. Is that correct?

He has a GPS system but sometime those things have me doing u-­‐turns more than anything else. Could you please give me directions to your house from a major intersection?

OK, will your house number be on the mailbox or your house?

Well if you want to grab a piece of paper and pen to write this down, again, his name is Wendell and he will be in a white car so when he pulls into your driveway you know it is him.

And what time did we say?

OK, well you have a good day and Wendell will see you (and your wife) on at

:00.

USE THIS WHEN YOUR SCHEDULE IS FILLING UP

He has some time available on Monday or Tuesday (pick days you have available). Which of those days are better for him to go over this information? (Never go past 48 hours).

Set Phone Appointment (if they will not commit to a three-way call of face-to-face appointment)

I understand. What is the best time for a follow up call? Morning Afternoon or Evening? Would you be available today or tomorrow? Would :00 be ok?

Thank you for your time. \_\_\_\_\_\_\_\_ will be calling you (time, day) to provide you with the information. Have a great day.

**Already 65**

**Hi, Mr. or Mrs. \_\_\_\_\_\_\_**(whoever picks up the phone, do not ask a question, just go right into it).

**My name is \_\_\_\_\_**(first name**) with Medicare Hotline and I’m calling people in your area who have recently had an increase on their Medicare Supplement plan. Are you currently on a Medicare supplement plan?**

(If they say NO, I have an employer plan or a Medicare advantage plan, hang up.)

YES : **Great! We have a new program that can save you hundreds of dollars per year receiving the same current benefits that you have now, while keeping all of your doctors. How has your plan been working out for you so far?**

**What company are you currently with?**(Let them answer first. A lot of times they are unsure or don’t want to say)

(if they don’t know, I say, “united healthcare?, Blue cross blue shield? Cigna?)

(If they don’t know, don’t dwell on it and move on. )

**Do you know which letter plan you have? Plan F, maybe plan G?**

**Do you know how much you pay per month?**(Let them answer first. If not, ask if it’s more or less than $100) (If they say less, ask this)

**Is your plan free? One of the $0 premium Medicare advantage plans?**

(if they say YES say thank you and hang up)

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