

Transition to Close & Close

This is a part of your "Core 4" and needs to be memorized word for word. Remember: Slow down, sit back, and relax. Talk to them like you're talking to a friend



(iPad down and turned off. Looking at the prospect.)

So different people like different things about this. When I was talking to the (Client), he/she just really liked that the money is paid directly to him/her. He/she said "we know which bills can wait and which ones can't" - He/she just liked the idea of being in control of how the money would be spent.

(Client) just liked how affordable it is. He/she said "it's not going to cause me to miss any meals to have it, but it sure could help to provide some meals if I ever needed to use it"

And (Client) just liked the savings piece. He/she said "it's not often you get great coverage and simultaneously save for the future."

But for you, what did you like the most about it? *(wait for response)*

And given how you've seen accidents happen first hand, and knowing that you have nothing else in place like this, **why would having this make sense to you?** *(listen)*

That's exactly what this is for! Before I can get you taken care of, I just need to make sure you qualify. Is it cool if I ask you a couple quick health questions?

open iPad and look at the health questions screen

1. In the past 12 months, has a member of the medical profession diagnosed or treated anyone proposed to be insured under this policy for any of the following:

Back pain or injury; neck pain or injury; joint pain, injury or disorder; or shoulder pain or injury?

If "YES," record the name(s) of person(s) below and check the appropriate box(es). The person(s) named below will not be insured under the policy for the first 12 months for any loss resulting from the part of the body indicated.

Person 1 Name:

Back Neck Shoulder

Elbow Hip Knee Ankle

Person 2 Name:

Back Neck Shoulder

Elbow Hip Knee Ankle



(ask appropriate health questions on the iPad)

Congratulations you qualify, which means we can go ahead and get you taken care of. I just need an address; do you get your mail at home or at the post office?

(move through the application on the iPad. If at any point they object you'll move to the rebuttal)