

Emergency Contact Referral Script (Revised)

Hi [Name], this is [Your Name]. I'm a licensed field underwriter, and I'm reaching out because [Client's Name] just got their life insurance policy set up—and they listed you as one of their emergency contacts.

(Pause here let them respond.)

Now, just to be clear—you're not responsible for anything financially, and your information isn't being used for anything else. We just do this as a courtesy, so if there's ever a claim or we can't reach [Client's Name], there's someone trustworthy we can contact to make sure their benefits are protected and reach the right hands.

I would also like to personally introduce myself so you know who to reach out to if anything ever comes up regarding their policy. I've been helping families for years, and I'm here as a resource—not just for [Client's Name], but for the people they care about too.

I'm going to send you a quick text message—no action needed on your part—I just want you to be able to see my screen really quick.

Just to confirm, I have your number as [read phone number]. Is that correct?

(Wait for confirmation.)

Perfect. Most people I speak with in this kind of situation usually ask about coverage for themselves too, especially since we specialize in affordable plans that protect loved ones and help cover final expenses.

I'm going to share my screen with you now—just a quick overview so you can see what these plans look like. But first—did you receive the text I just sent you?