



Hi _____,

This is _____ calling from GetMyAnnuity.com / GetMyProtection.com.

GetMyAnnuity.com:

My apologies, we were supposed to get back to you a while ago about guaranteed protection and growth for your retirement savings.

Did you still need help with that?

(No): Do you have any questions about annuities that we could answer, or would you like us to mail you a free consumer guide?

(Yes):

- What does an annuity offer that caught your interest?
- How many more years before you plan to retire?
- Verify age, retirement savings amount, contact information
- Schedule appointment
- Email suitability questionnaire

GetMyProtection.com:

My apologies, we were supposed to get back to you a while ago about preparing a protected future for you and your loved ones

Did you still need help with that?

(No): Do you have any questions about life insurance that we could answer, or would you like us to mail you a free consumer guide?

(Yes):

- What are your goals for life insurance?
- Do you use tobacco products?
- What medications do you currently take?
- Verify age, contact information, schedule appointment
- Email consumer guide

DIALS	DATE: TIME START: TIME END:
APPOINTMENTS	
CONTACTS	