

# The Moment of Truth: CONVERSATION GUIDE

Greeting	Hello, [Agency Name], this is [Your Name]. How may I help?
Beneficiary states that a loved one has died.	
Expression of Sympathy	Oh [Beneficiary Name], I am so sorry to hear about [Deceased's Name], and I am so sorry for the loss you've experienced.
Getting to the Data	I want you to know we're here to help you through every step of the way. Let me pull up the policy information so we can get the claims process started right away.
"Peace-of-Mind" Process Explanation	First of all, don't worry about a thing here. [EA/EFS Name] will contact you for some information before this time tomorrow. [He/She] will help you fill out the claim form. Then we can submit the paperwork on your behalf if you choose. When we receive the proceeds from your [Loved Ones Relationship, e.g. Father, Wife, etc.]'s life insurance policy, [EA/EFS Name] will deliver the funds to you right away.*



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## Allstate Offers More

[Beneficiary Name], we understand what a difficult time this is for you ... we also know that there are a lot of things to think about and many demands for your attention. We want to let you know that [EA/EFS Name] can help you with more than just Allstate claim forms, including any other claims or paperwork you may need to deal with. This might make things easier for you because [EA/EFS Name] will already have all the information.

## Next Steps

So, [Beneficiary Name], I've started the process here. The next step is that [EA/EFS Name] will contact you to schedule time to go over the claims information and to see if there are any other areas where we can help. Would you like to give me your email address so we can send you status updates of the claims progress?

## Closing

Again, I am so sorry to hear about [Deceased's Name]. Please take care and don't hesitate to call us with any questions or for additional help we can provide. We really are here for you. [EA/EFS Name] will call you shortly and be able to support you throughout the entire claims process.

\* If the claimant's location is more than 2 hours away by car, offer to connect the beneficiary with a local Allstate Agency for delivery. If no Allstate Agency is closer than yours, you may opt to have the check delivered by mail. If the claim is under \$50,000, the Express Claims process may be used.



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