



Mortgage Protection

PROTECT YOUR HOME.
PROTECT YOUR FAMILY.





Who We Are

We help families stay in their homes — no matter what life brings.

Our Mortgage Protection plans are simple, affordable, and built to ease the burden when life takes an unexpected turn.

This conversation is quick, straightforward, and focused on helping you protect what matters most.





Protecting What Matters Most

Because your family's future deserves a plan.

- What would your family need to stay secure if life took an unexpected turn?
- Mortgage Protection helps ensure they can stay in the home — no matter what
- It's not just about the money — it's about peace of mind and stability
- Life is unpredictable — but your coverage doesn't have to be
- Let's build a plan that fits your family, your needs, and your budget



Planning That Goes Beyond the Basics

You've probably gotten a few calls about Mortgage Protection — maybe more than a few.

But you took the time to meet — because your family's future deserves a real plan.

More Than Just a Death Benefit

This isn't just about paying off a mortgage when someone passes. The right plan can:

- **Living Benefits** — coverage that pays while you're still alive
- **Unemployment Relief** — temporary help if you lose your job
- **Home Stability** — support when your family needs time to adjust
- **Convertible Coverage** — evolve your plan as life changes
- **Long-Term Peace of Mind** — protection that grows with you

Most agents set up a policy, collect a commission, and disappear. We stay with you — because your protection plan should evolve with your life.





We Understand What's at Stake

Life Can Change in an Instant

None of us plan for the worst to happen — but if it did, would your family be able to stay in the home you built together?

Keep Your Family Grounded

Losing someone is already overwhelming. Having to move on top of that can turn grief into chaos. Mortgage protection helps avoid that added stress.

Protect Your Child's Routine

Kids thrive on stability. Being able to stay in their school, with their friends and teachers, makes a big difference after a loss.

Stay Connected to What Matters

A familiar neighborhood. Supportive friends. A church or community you trust. Coverage helps your loved ones keep the life they know.

Guard Against Disruption

Mortgage protection is more than just a policy — it's a plan that helps your family stay financially steady while they find their emotional footing.





Why Mortgage Protection?

The biggest reason families choose mortgage protection? Because they want to know that **no matter what happens**, their home is safe. We can't predict the unexpected — but we can prepare for it. Mortgage protection gives your loved ones **options** when life takes a turn. To make that happen, we use simple, affordable life insurance plans that are built around **real needs and real life**.

Three Key Areas Every Family Should Think About:

1. Final Expenses

Let's face it — none of us are getting out of here alive. When that day comes, the last thing your family should worry about is how to cover the cost of goodbye.

2. Income Replacement

Whether it's from work or disability, losing income can flip your family's world upside down. Life insurance helps fill that gap so your loved ones aren't left scrambling.

3. Mortgage Protection

This is what brings us here today — making sure your family can stay in the home you've worked so hard to give them. Whether we're paying off the full mortgage or just keeping payments going, the goal is the same: **security, stability, and peace of mind**.



Making Sure You Qualify for the Right Plan

We've talked about *why* mortgage protection matters.
Now let's talk about *how* we get you the plan that actually fits.

Before we can move forward, I just need to make sure which plan you qualify for — and that starts with a quick check on your current health.

Here's what I'll ask:

- Any existing health conditions?
- Are you taking any medications right now?
- Have you used tobacco in the past 12 months?

That's it — simple stuff, nothing invasive.



Good news:

Most of our plans are **effortless** to apply for:

- ✓ No medical exams
- ✓ No needles
- ✓ No lab work





Reviewing Your Personalized Coverage Options

“Coverage built around real needs, real life.”

Let's find the plan that fits your life — and protects the people you love.

Hang tight while I pull together the best options based on your health and eligibility.



You've Just Taken a Big Step



✓ *Your plan is now in motion — your family's home is protected.*

✓ *Your monthly rate is guaranteed to stay the same for the full term — no surprise hikes.*

✓ *Your coverage can't be canceled due to changes in age or health.*

✓ *It begins right away — no waiting periods, no hoops to jump through.*

🏠 *And if something serious happens while you're living, your policy may even provide benefits to help you through it.*



Looking Ahead Together



We've got your coverage in place — and that's the most important step.

But before we wrap up, I'd love to ask a couple quick questions that help me understand your bigger picture:

- Have you started thinking about what retirement might look like for you?
- Are there any goals or concerns you'd like to work toward in the future?

If you're open to it, I'd be happy to circle back down the road and help you plan beyond just life insurance — things like savings, debt elimination, or retirement income.

This part isn't required — but it can really help make sure everything works together for your future.





Know Someone Who Should Hear This Too?

Most of the people I help are referred by someone who's already been through this conversation.

If someone comes to mind — a friend, family member, or coworker — I'd be happy to reach out and see if I can help them too.

Who's one person you care about that might want the same kind of peace of mind we just set up for you?

Name: _____

Phone: _____





Thanks Again — I'm Here for You



Thanks again for your time today — I really appreciate the chance to connect.
If any questions pop up, or if someone you care about needs help with protection like this, feel free to reach out.



I'll check in soon to make sure everything's going smoothly.

