

Transcript: Franchesca

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Full Transcript

Thank you for calling... My name is Francisca. How can I assist you today? Hello. I need to add a beneficiary to my life insurance. What staffing company do you work with? Uh, W- I mean, API. Or WSI. Oh, um, Focus... I mean, work Focus Strategies? Yes. Here we go. And what are the last four of your social? 7-6-7-3. Please verify your mailing address and date of birth to make sure I have the right account in front of me. Uh, 1150 Arney Road and 10-05-05. All right, I'm going to have this one. I'm going to write you down as 715-736-4481. 517. 517. All righty. Who would you like to put down as a beneficiary? Uh, Natalia Huntley. And what is her relationship to you? Uh, fiancée. All right. And aside from adding her as the beneficiary, was there anything else we can assist you with today? Uh, no. Understood. So you are all set, sir. Once you start working and see the first deduction of the 7797, following Monday, the policy will be active. And that same week of activation, Friday would be when the carrier send out those benefit cards by mail. They could take up to three, at most four weeks, after your activation week to get to you. And one of them is n- not gonna be sent physically to the house, which will be the VSP Classic one. American Public Life, for some reason, 'cause they also are the ones for your dental, they only do digital copies for those medical cards, sent to the email and file which we currently don't have in email. Would you like me to put one down so that you can get it there once it is accessed? Yes. All right. Go ahead with that email. 01... 01Charles.Wagner3@gmail.com. 01Charles.Wagner3@gmail.com? Yes. All right. And then once you're active, if you do want a physical card sent to your house, just give us a call so that we can put in the mail order once you're active. Okay. All right. Was there anything else we can assist you with today aside from this? Nope. Have a great day and thank you for giving us a call today, Mr. Wagner. You too. Thank you. Bye. Bye-bye.

Conversation Format

Speaker speaker_0: Thank you for calling... My name is Francisca. How can I assist you today?

Speaker speaker_1: Hello. I need to add a beneficiary to my life insurance.

Speaker speaker_0: What staffing company do you work with?

Speaker speaker_1: Uh, W- I mean, API. Or WSI.

Speaker speaker_0: Oh, um, Focus... I mean, work Focus Strategies?

Speaker speaker_1: Yes.

Speaker speaker_0: Here we go. And what are the last four of your social?

Speaker speaker_1: 7-6-7-3.

Speaker speaker_0: Please verify your mailing address and date of birth to make sure I have the right account in front of me.

Speaker speaker_1: Uh, 1150 Arney Road and 10-05-05.

Speaker speaker_0: All right, I'm going to have this one. I'm going to write you down as 715-736-4481.

Speaker speaker_1: 517.

Speaker speaker_0: 517. All righty. Who would you like to put down as a beneficiary?

Speaker speaker_1: Uh, Natalia Huntley.

Speaker speaker_0: And what is her relationship to you?

Speaker speaker_1: Uh, fiance.

Speaker speaker_0: All right. And aside from adding her as the beneficiary, was there anything else we can assist you with today?

Speaker speaker_1: Uh, no.

Speaker speaker_0: Understood. So you are all set, sir. Once you start working and see the first deduction of the 7797, following Monday, the policy will be active. And that same week of activation, Friday would be when the carrier send out those benefit cards by mail. They could take up to three, at most four weeks, after your activation week to get to you. And one of them is n- not gonna be sent physically to the house, which will be the VSP Classic one. American Public Life, for some reason, 'cause they also are the ones for your dental, they only do digital copies for those medical cards, sent to the email and file which we currently don't have in email. Would you like me to put one down so that you can get it there once it is accessed?

Speaker speaker_1: Yes.

Speaker speaker_0: All right. Go ahead with that email.

Speaker speaker_1: 01... 01Charles.Wagner3@gmail.com.

Speaker speaker_0: 01Charles.Wagner3@gmail.com?

Speaker speaker_1: Yes.

Speaker speaker_0: All right. And then once you're active, if you do want a physical card sent to your house, just give us a call so that we can put in the mail order once you're active.

Speaker speaker_1: Okay.

Speaker speaker_0: All right. Was there anything else we can assist you with today aside from this?

Speaker speaker_1: Nope.

Speaker speaker_0: Have a great day and thank you for giving us a call today, Mr. Wagner.

Speaker speaker_1: You too. Thank you. Bye.

Speaker speaker_0: Bye-bye.