

## **Transcript: Francesca**

**Baez-6251051160748032-6149534813569024**

### **Full Transcript**

Thank you for calling Benefits in a Car. My name is Francesca. How can I help you? Hi, Francesca. This is Kimberly Stark. Uh, I was calling because, uh, when I called, uh, earlier to set up our life insurance, I was advised my husband would have to call back in and let you know who, uh, his beneficiary would be. Is it his policy or your policy? After I started telling... It's our policy through WorkSource. So what I mean by, ma'am, the employee of WorkSource will be the owner of the policy. Who's the employee owner of the policy? Kimberly Stark. Okay, so it will be your policy. What are the last four of the SSN? 9891. They just said that after, uh, we, uh, started paying it, he would have to call in and advise on his part. I'm not sure why 'cause you're the owner of the policy. Gonna have to see the notes on this one. What are the last four of the SSN? I'm sorry. You said it was 9891? Ni- Yes. Could you verify your mailing address for me and your date of birth? 415 Avenue 5 Northeast Cove, Apartment C, Atkins, Arkansas 72823. We have the phone number to reach you, 479-324-0180. No, that number needs to be changed. What will be the new number? 479... Uh, 490-7630. And we have your date of birth. I'm not sure if you already confirmed it with me, down as 11/07/'75. Yes. And I have your email down as kimberly.stark1965@gmail.com. Yes. Hmm. Okay, Ms. Stark. I see what she meant when she told you that. So since the spouse is also on the term life on the life insurance, she was advising you to speak with the carrier because they're the only ones that will be able to put a beneficiary for the term life that you took out for him. So they will be the ones to put his beneficiary. We only have access to yours. I can get you transferred over to them. Is going to be American Public Life? And give you their phone number as well. Okay. Ah, you can transfer. Thank you. Uh, of course, Ms. Stark. Bear with me one moment.

### **Conversation Format**

Speaker speaker\_0: Thank you for calling Benefits in a Car. My name is Francesca. How can I help you?

Speaker speaker\_1: Hi, Francesca. This is Kimberly Stark. Uh, I was calling because, uh, when I called, uh, earlier to set up our life insurance, I was advised my husband would have to call back in and let you know who, uh, his beneficiary would be.

Speaker speaker\_0: Is it his policy or your policy?

Speaker speaker\_1: After I started telling... It's our policy through WorkSource.

Speaker speaker\_0: So what I mean by, ma'am, the employee of WorkSource will be the owner of the policy. Who's the employee owner of the policy?

Speaker speaker\_1: Kimberly Stark.

Speaker speaker\_0: Okay, so it will be your policy. What are the last four of the SSN?

Speaker speaker\_1: 9891. They just said that after, uh, we, uh, started paying it, he would have to call in and advise on his part.

Speaker speaker\_0: I'm not sure why 'cause you're the owner of the policy. Gonna have to see the notes on this one. What are the last four of the SSN? I'm sorry. You said it was 9891?

Speaker speaker\_1: Ni- Yes.

Speaker speaker\_0: Could you verify your mailing address for me and your date of birth?

Speaker speaker\_1: 415 Avenue 5 Northeast Cove, Apartment C, Atkins, Arkansas 72823.

Speaker speaker\_0: We have the phone number to reach you, 479-324-0180.

Speaker speaker\_1: No, that number needs to be changed.

Speaker speaker\_0: What will be the new number?

Speaker speaker\_1: 479... Uh, 490-7630.

Speaker speaker\_0: And we have your date of birth. I'm not sure if you already confirmed it with me, down as 11/07/'75.

Speaker speaker\_1: Yes.

Speaker speaker\_0: And I have your email down as kimberly.stark1965@gmail.com.

Speaker speaker\_1: Yes.

Speaker speaker\_0: Hmm. Okay, Ms. Stark. I see what she meant when she told you that. So since the spouse is also on the term life on the life insurance, she was advising you to speak with the carrier because they're the only ones that will be able to put a beneficiary for the term life that you took out for him. So they will be the ones to put his beneficiary. We only have access to yours. I can get you transferred over to them. Is going to be American Public Life? And give you their phone number as well.

Speaker speaker\_1: Okay. Ah, you can transfer. Thank you.

Speaker speaker\_0: Uh, of course, Ms. Stark. Bear with me one moment.