

## **Transcript: VICTORIA**

**Taylor-4641858126561280-6483817866674176**

### **Full Transcript**

Your call may be monitored or recorded for quality assurance purposes. Thank you for calling Benefits on the Card. This is Victoria. How can I help you? Hey, Victoria. So I need to make a, a quick change in my beneficiaries for my term life insurance policy. Okay. I need to take one... I need to take one individual off and make it 50/50. Okay. What's the name of the agency you work for? The Resource. And the last four of your Social? 3498. And your first and last name? Tavaris Strickland. Gotcha. Do you mind verifying your address and date of birth? 03/19/77, 1007 Haywood Street, Winston-Salem, 27105, Apartment 18. Email: tmantelt@hotmail.com. Phone number: 336-655-4734. Okay. Um, and who are you wanting to take off? I need to take off Chris, Chris Strickland. I had him down for 10% beneficiary, but I want to keep Janice as 50% and Augusta as 50%. Since it is- Okay. ... just a \$20,000 policy, it's just, yeah, if it was a little bit larger maybe. Um, but yeah, I just wanna do those two for right now. All right. So we're doing 50 for Augusta and then 50 for Janice. Yes, please. Okay. Give me one second. Excuse me. Um, all right. I went ahead and made it 50/50. Was there anything else you needed help with? Um, you just, uh, continue to enjoy the rest of your day. Thank you so much for your time and your help. Take care. Yes, sir. You too. Bye.

### **Conversation Format**

Speaker speaker\_0: Your call may be monitored or recorded for quality assurance purposes.

Speaker speaker\_1: Thank you for calling Benefits on the Card. This is Victoria. How can I help you?

Speaker speaker\_2: Hey, Victoria. So I need to make a, a quick change in my beneficiaries for my term life insurance policy.

Speaker speaker\_1: Okay.

Speaker speaker\_2: I need to take one... I need to take one individual off and make it 50/50.

Speaker speaker\_1: Okay. What's the name of the agency you work for?

Speaker speaker\_2: The Resource.

Speaker speaker\_1: And the last four of your Social?

Speaker speaker\_2: 3498.

Speaker speaker\_1: And your first and last name?

Speaker speaker\_2: Tavaris Strickland.

Speaker speaker\_1: Gotcha. Do you mind verifying your address and date of birth?

Speaker speaker\_2: 03/19/77, 1007 Haywood Street, Winston-Salem, 27105, Apartment 18.  
Email: tmantellt@hotmail.com. Phone number: 336-655-4734.

Speaker speaker\_1: Okay. Um, and who are you wanting to take off?

Speaker speaker\_2: I need to take off Chris, Chris Strickland. I had him down for 10% beneficiary, but I want to keep Janice as 50% and Augusta as 50%. Since it is-

Speaker speaker\_1: Okay.

Speaker speaker\_2: ... just a \$20,000 policy, it's just, yeah, if it was a little bit larger maybe. Um, but yeah, I just wanna do those two for right now.

Speaker speaker\_1: All right. So we're doing 50 for Augusta and then 50 for Janice.

Speaker speaker\_2: Yes, please.

Speaker speaker\_1: Okay. Give me one second. Excuse me. Um, all right. I went ahead and made it 50/50. Was there anything else you needed help with?

Speaker speaker\_2: Um, you just, uh, continue to enjoy the rest of your day. Thank you so much for your time and your help. Take care.

Speaker speaker\_1: Yes, sir. You too.

Speaker speaker\_2: Bye.