

## “DMS/HQ POST VERBAL TRANSFER PHONE SCRIPT”

“Hello, I’m \_\_\_\_\_ from American Legion (*Post, District, Department, etc.*) here in the area. We are contacting members of our department (State) Headquarters Post who live in this area.

“Are you \_\_\_\_\_? You should have received a letter about a week ago that we would be in the area working membership. The reason we are contacting you as a Headquarters Post member is to see if you would be interested in transferring your membership into an active post in \_\_\_\_\_. This way, the dues you pay next year and beyond will stay and help support the community in which you live.”

“We can make the transfer verbally over the phone; all we need is your approval to do so.”

If the member is interested in transferring, complete the Member Data Form, confirming their mailing address, branch of service and war era. If possible, capture their birth date.

In the Member Signature block, print: **Verbal approval as per member.**

National Staff member or Department, District or Post officer will sign all MDF’s upon completion

Tell them what their dues amount will be when they renew for **20xx** and that they should mail to their new post, not Indianapolis or Department, and be sure to advise member that they can pay their **20xx** dues now, and **“we can come pick it up if that is convenient for you”** or **“You can bring your 20xx dues to this Saturday’s** (insert correct day) open house if you would like.”

Advise member that they will need to provide their eligibility paperwork (**DD-214** or discharge papers) as soon as possible to the post they are transferring into. If they need help with obtaining their paperwork, have them contact a Department Service Officer (attached is the DSO contact information).

Give the member the address for the post, the meeting time and date and point of contact.

Remind the member of the DSO availability on all three days this week to work on any VA issues they may have, including starting claims.

Thank member for his/her time and cooperation.