DSCR/ Business Purpose Mortgages

An initial document request has already been sent to the client via automation.
Give the client a call and introduce yourself.

"Hello, my name is _____, I'm an account executive at Jackson Funding. A document request was just sent over through a text. Do you already have all of that information readily available? If not, go ahead and send what you have. The minimum information I need is property address, square footage, and purchase price."

note if they already have a purchase agreement or LOI yet.

Update the CRM opportunity with detailed notes from the conversation.
Move them to the **DSCR Mortgage Review** Pipeline Stage.
Once the funding director informs you of a soft approval, add them to the **Send Mortgage Application** pipeline Stage

Answer NO questions about loan rates, preapprovals, appraisals, or information that should be discussed with underwriting. Assure them that you're there to make sure the right information is collected and that their loan specialist will be in contact with them once the information is submitted to discuss details and further information.

Business Funding

Call the contact and introduce yourself. They **have not** been sent a document request yet. Confirm the prequalifying information.

"Hello, my name is _____, I'm an account executive at Jackson Funding. I see you're interested in our business funding program, I'm gonna ask you a couple of prequalifying questions to determine your initial eligibility." (grab their first name, last name, email, phone number and update the CRM immediately)

Prequalification:
-650+ Credit Score
-At least 3 months in business
-Located in the US
-No Bankruptcy's

If they meet the minimum qualifications, move them from the **Warm Inbound** pipeline stage to the **Send Application** pipeline stage. This will send the funding application, fraud terms agreement, and minimum document request via email. Inform them that they will need to check their email and confirm WHILE THEY ARE ON THE PHONE, that they received it. If they did not, have them check their spam folder.