

welcome Call script
Welcome Call to Borrower:

Good Morning/Afternoon, this is (your First Last name) with (Company) calling on a recorded line. May I please speak to (Borrower First, Last name)?

Ask Borrower to please verify the last four digits of their social.

Thank them.

State reason for call.

Verify names(s) on loan and title and confirm, if applicable, both will be present to sign documents at closing.

Verify the location/ address of subject property and type of residency (Primary, Investment or Second home)

Go over loan comparison (existing verses proposed), state benefit(s) of new loan

Go through title questionnaire

State your completion of reviewing all application documents and tell Borrower of any needed items. Be sure to convey urgency in returning docs to us. Confirm email address on file and tell Borrower you will send a follow up email once off the phone which contains itemized requests from Borrower. State all of your contact information is in the signature of the email should they have any questions or concerns in between the times you are contacting them.

Go over process of what happens when all docs from Borrower are received and CTC is in. Tell them timeline after you send their file to Underwriting and what will happen upon Final Approval or conditions.

Upon Final Approval: Scheduling Dept. will contact you to set up your closing. Once closing is scheduled, Closing Disclosure will be sent and must be acknowledged to move the closing timeline forward.

Upon condition(s): You will contact Borrower immediately to meet any conditions as quickly as possible to get their application back to Underwriting and Final Approved.

If applicable: Let Borrower know they will receive a customer satisfaction to let us know how we did. Please take a few minutes to complete, it is very appreciated.

Tell them of the next day you would like to contact them and if that day is OK and what time is good to call?

Ask if they have any other questions while you have them on the line today?

Confirm when you are contacting them again..have a wonderful day.

Thank you for choosing Freedom Mortgage.