

Mortgage Mailer Lead Script



Hello, is this (Client Name)?

Hey (Client Name), this is (Your Name). I am calling in regards to your mortgage with (Client Lender) for your property on (Client Street Address). The reason I'm calling, I was assigned to the paperwork you received in the mail, filled out, and sent back to us. It is regarding the mortgage coverage for the property, where if you passed away or became sick it would pay off the note.

You marked your date of birth here as (Client Date of Birth) and that you are a (non-smoker/smoker), is that correct? You also marked your wife's date of birth on here as (Client Date of Birth) and that she is a (non-smoker/smoker) as well, is that correct? Okay, great.

My job, very simply, is I have to sign off that I got this information to you regarding the coverage for the property. Normally I would have to send an agent out to the house, but to make things simple I can do this over the phone.

Are you both working full time or are y'all retired?

Perfect, what time will y'all be off work today for me to give you a quick phone call?

"4:00"

I have an opening around 5:00 PM, would that work okay for y'all?

Okay, great.

Do me a favor, make sure to save my phone number in your phone. I will be calling you back from this same number so you know it is me, again my name is (Your Name), that is (Spell Out Your Name).

Last thing, I am avoiding sending anyone out to the house so make sure to let me know if someone comes up that would make y'all unavailable. If I can't get a hold of you I do have to send this to a different department that normally comes out to the house. It is not a big deal, just let me know if something comes up. I look forward to speaking with y'all then.

Bye Bye.