

Setting Virtual Appointment via Text Message

• INITIAL TEXT TO SET APPOINTMENT

(Client First Name)

This is (**Agent First and Last Name**), Senior Underwriter, assigned to your paperwork for the Mortgage Protection availability for your loan with (**Mortgage Lenders Name**).

I'm reaching out to set an appointment time, by phone, to go over the information with you.

Our records show that no one has provided you with your options.

Everything can now be done over the phone (COVID changed our process). This will be a brief call to see if you qualify for the protection.

Call or text me back at this number to set up a time.

I still have times available today at: 2:30pm, 4:30pm, 6:30pm and 8pm.

What works best for you?

• TEXT UPDATE FOR FOLLOW UP TIMES STILL AVAILABLE

(As people respond to your initial text to set an appointment and select a time, you would send this text to those people that haven't responded to your initial text with your times that are still available)

*UPDATED TIMES STILL AVAILABLE TO PROVIDE THE MORTGAGE

PROTECTION INFORMATION:

Today: 5:00pm

Tomorrow: 12:00pm or 2:00pm

• APPOINTMENT CONFIRMATION TEXT (OPTIONAL CONFIRMATION)

*CONFIRMATION FOR YOUR MORTGAGE PROTECTION APPOINTMENT:

Hi (**Clients Name**), I have you and (**co-borrower or spouse name**) confirmed to review the Mortgage Protection information.

Please make sure you are both available at the time of our call.

This will be a brief call.

DATE: Today, Dec. 26th

TIME: Between 4pm and 4:30pm

Please reply with "YES" to confirm.

- **APPOINTMENT REMINDER TEXT**

****MORTGAGE PROTECTION****

****APPOINTMENT REMINDER****

DATE: Today, Dec. 26th

TIME: Between 4pm and 4:30pm

(Clients Name), you have a scheduled appointment today with your Mortgage Protection Senior Underwriter.

Please make sure your Spouse or Co-Borrower is present at the time of our call.

This is the phone number that I will be calling from. Please make sure that you answer and allow for a 30-minute window in case I am running behind.

I look forward to speaking with you.

- **OBJECTION: "I DIDN'T REQUEST ANY INFORMATION"**

This is the information regarding the financial protection for you and **(co-borrower or spouse name)** so you do not lose your home because of a sudden loss in income from an unexpected death or illness.

Again, I can do this over the phone with you. This will be a brief call.

I still have availability today at 4pm, 5pm or 7pm.

Which works best for you and **(co-borrower or spouse name)**?

- **CLOSEOUT TEXT**

Good Morning **(Clients Name)**.

This is **(Agents Name)** I have to close your file out for the Mortgage Protection availability by the end of the day today.

Let me know how you would like to move forward please.

Thanks!