

# TEXT MESSAGE SCRIPT: VIRTUAL

## SETTING APPOINTMENTS VIA TEXT MESSAGE:

### INITIAL TEXTS TO SET APPOINTMENT (FIRST 4 DAYS):

*(Client's first name),*

This is *(your name)*, I'm the licensed Field Underwriter with Equis Financial assigned to your request for the mortgage protection availability on your recent loan or refinance. Our records show that you have not received your options yet. I'm reaching out to set up a time to provide you the information you've requested.

Everything can now be done over the phone. It will be a brief call to see if you qualify for the protection. You can call or text me back at this number to set up a time. As of now, I still have these times available today at: *(2:30 PM, 3:00 PM, 3:30 PM, 4:00 PM, 4:30 PM, 5:00 PM, 5:30 PM, 7:00 PM, 7:30 PM and 8:30 PM)*.

What time works best for you?

### TEXT RESPONSE WHEN APPOINTMENT IS SET BY PHONE:

*(Client's first name)*, this is *(your name)* reaching out about your mortgage protection. I have you scheduled for *(time)*. I will call from this number. Please save my number in your phone to prevent the call from being marked as spam. Have a great day. Talk to you soon.

### TEXT RESPONSE WHEN APPOINTMENT IS SET BY TEXT MESSAGE:

Great, I have you scheduled for *(time)*. I will call from this number. Please save my number in your phone to prevent the call from being marked as spam. Have a great day. Talk to you soon.

### TEXT RESPONSES TO NO RESPONSE:

*(Client's first name)*, here are the updated times available today: *(3:30 PM, 4:00 PM, 5:00 PM, 5:30 PM, 7:00 PM, 7:30 PM and 8:30 PM)*. Let me know if any of these times work for you.

Here are the last available times today: *(5:00 PM, 7:00 PM and 8:30 PM. If today will not work, I will be available tomorrow from 3:00 PM - 9:00 PM)*.



# TEXT MESSAGE SCRIPT: VIRTUAL

## 5TH DAY OF ATTEMPTING TO SET APPOINTMENT:

Good morning (*client's first name*), this is (*your name*). I have been trying to get a hold of you for a couple of days now to run through your options about making sure your loan is covered in the event of a death or a disability for you and your family. I wanted to reach out to you first this morning before I had anything else on my schedule to make sure we can find a good time. I will be available today between (**3:00 PM - 9:00 PM**). Let me know what time works for you. Thanks!

## 6TH DAY AND BEYOND OF ATTEMPTING TO SET APPOINTMENT:

Hello (*client's first name*), this is (*your name*). I haven't heard back from you, I assume you have been busy. My availability to give you a quick call today: (**3:00 PM, 3:30 PM, 4:00 PM, 5:00 PM, 5:30 PM, 6:00 PM, 7:00 PM and 8:00 PM**). Let me know what works best for you. Thanks.

## FOLLOW UP TEXT:

Hi (*client's name*), this is (*your name*) reaching out about your mortgage protection. We spoke several weeks ago. You asked me to give you a call back because you needed some time to think about what plan you wanted to go with. Just checking to see what you decided to go with and what I can do to help you. I will be available today between (**3:00 PM - 9:00 PM**). Let me know what time works for you. Thanks!

## FINAL FOLLOW-UP TEXT BEFORE CLOSING FILE:

Hi (*client's name*), this is (*your name*) reaching out about your mortgage protection. We spoke several weeks ago. You asked me to give you a call back because you needed some time to think about what plan you wanted to go with. Just checking to see what plan you decided to go with and what I can do to help you. We are running out of time and needing to close your file. Just wanted to check and see if you are still wanting this before they close out your file for the mortgage protection. I will be available today between (**3:00 PM - 9:00 PM**). Let me know what time works for you. Have a great day.

# TEXT MESSAGE TEMPLATES



## APPOINTMENT CONFIRMATION TEXT

\*CONFIRMATION FOR YOUR MORTGAGE PROTECTION APPOINTMENT\*

Hi *(client's first name)*, I have you confirmed to review the mortgage protection information. Please make sure you and your co-borrower are both available at the time of our call. This will be a brief call.

DATE: *(Today, Jan. 1st)*

TIME: *(Between 4:00 PM and 4:30 PM)*

Please reply with "YES" to confirm.



## APPOINTMENT REMINDER TEXT

\*\*MORTGAGE PROTECTION\*\*

\*\*APPOINTMENT REMINDER\*\*

DATE: *(Today, Jan. 1st)*

TIME: *(Between 4:00 PM and 4:30 PM)*

*(Client's first name)*, you have a scheduled appointment today with your Mortgage Protection Underwriter. Please make sure your 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 TEXT: "I DIDN'T REQUEST ANY INFORMATION..."

This is the information regarding the financial protection for you and your co-borrower, 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 *(4:00 PM, 5:00 PM, or 7:00 PM)*. Which works best for you and your co-borrower?



## FILE CLOSEOUT TEXT

Good morning *(client's first name)*, this is *(your 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!

**PLEASE NOTE: You should notify the Lead Department at [leads@equisfinancial.com](mailto:leads@equisfinancial.com) if a client requests that their information be removed from Equis' system.**