

SETTING APPOINTMENTS VIA TEXT MESSAGE

Initial texts to set appointment (first 4 days):

9:00 AM:

Clients First Name,

This is **Agents First and Last 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. I'm reaching out to set up a time, by phone, to provide you the information you've requested. Our records show that no one has provided this to you yet.

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?

11:00 AM:

Clients 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.

1:00 PM:

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.**

5th day of attempting to set appointment:

9:00 AM:

Good morning **Clients First Name**, this is **Agents First and Last 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!

11:00 AM:

Clients 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.

1:00 PM:

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

6th+ day of attempting to set appointment:

9:00 AM:

Hello **Clients First Name**, this is **Agents First and Last 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.

11:00 AM:

Clients 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.

1:00 PM:

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**.

Appointment confirmation text:

CONFIRMATION FOR YOUR MORTGAGE PROTECTION APPOINTMENT

Hi **Clients 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**

Clients First Name, you have a scheduled appointment today with your Mortgage Protection Senior 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 **Clients First Name**, this is **Agents First and Last 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 if a client requests that their information be removed from Equis' system.*