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National Training Team

Video Recording Checklist

- ✓ Start by introducing yourself and your practice
- ✓ Mention the person who referred you if any (for this sample, Amy Realtor referred you)
- ✓ Briefly describe the programs offered and mention that the client can click the more info buttons in each quadrant to drill down on the details)
- ✓ End with a solid call to action. Something like "I know you are going to have questions after viewing this presentation, so please call me immediately so we can ensure you have all of the information necessary to make an educated mortgage decision."

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Template for a New/Existing Homeowner

Good Afternoon Mr. and Mrs.

Thank you for your time on the phone.

I've prepared a personalized financing analysis for your review.

Please click here to view: ***(PLACE EDGE LINK HERE)***
(this presentation can be viewed from a desktop or laptop computer for full functionality)

I've also attached a PDF copy for you to print if it's easier for you to view.

I would like to schedule a quick follow up call to ensure you are 100% confident with the information contained in your analysis.

Do you have time today for a quick 5 minute phone call to review?

Please let me know if you have any questions.

Sincerely,

Teddy Corral
Success Coach Manager
tcorral@mortgagecoach.com

*** This is not a commitment to lend and is based on preliminary review of your information***

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Template for a New Homeowner

Good Afternoon Mr. and Mrs.

Thank you for your time on the phone this morning, I'm excited to help you and your family into your new home!

I've prepared a personalized financing analysis for your review.

Please click here to view: ***(PLACE EDGE LINK HERE)***

I've also attached a PDF copy for you to print if it's easier for you to view.

I would advise that we schedule a quick follow up call to ensure you are 100% certain on all of the information contained within the analysis.

I believe we should also gather the following items so we can be exact in calculating your income and maximum qualifying loan amount.

Please upload, email, fax or mail the following at your convenience.

- 2013 and 2012 W-2's and full tax returns, both personal and business if applicable.
- 2014 W-2's.
- Two most recent pays-stubs with year to date income.
- Copy of your fully executed employment contract.
- Signed Docs (attached).
- Most recent monthly bank statement showing source of down payment or explanation as to where the down payment will come from (all pages please).
- Most recent monthly 401k/IRA/403B retirement statement (all pages please).

Once we've analyzed this information we can quickly issue a full Credit and Income Approval Letter. Please let me know if you have any questions.

Sincerely,

Teddy Corral
Success Coach Manager
tcorral@mortgagecoach.com

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Template for a New/Existing Homeowner

Dear Mr. and Mrs. Home Buyer

Thank you for the opportunity to earn your business. It was a pleasure speaking with you and I look forward to helping your family get the best program possible for your particular situation.

Please click on the following link to be taken to an online presentation that will go over the loan options we spoke about earlier. Also please note that you can click on any of the **"More Info"** tabs located on the report for a more detailed breakdown of payments and programs, as well as closing costs associated with each program.

(PLACE EDGE LINK HERE)

I will be calling you later as a follow up to address any questions you may have, as well to walk you through the report online to make sure that you fully understand the numbers and what they represent. My goal is to exceed your expectations in every way and provide you with the best mortgage experience possible!

I have also included a list of documentation necessary to get the loan process started, so please feel free to start gathering these as soon as possible.

Thank you for your time and I will look forward to speaking to you soon,

Teddy Corral
Success Coach Manager
tcorral@mortgagecoach.com

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Template for Realtor

Hello Mr. or Mrs. Realtor

It was a pleasure meeting with you! I am looking forward to helping you prepare your clients to purchase their new home.

I have enclosed a link to a detailed "Finance Options Report" where I walk you through the details of a few loan options to review. Your feedback on the information that I share in the report & video will help me design the Total Cost Analysis "A perfect housing budget" for your clients.

Here is the link to your report - ***(PLACE EDGE LINK HERE)***
(Please Note: You may be promoted to download the Mortgage Coach App on your Mobile Device)

One thing that I know is – questions will arise, so please do not hesitate to contact me. I want to make sure that you are 100% comfortable with the details and the process involved in preparing a Total Cost Analysis for your clients.

P.S. – Once your clients are ready to get qualified and identify a home(s) that they may be interested in, just email me the MLS sheet and I will create a report just like the one above specific to that property.

Sincerely

Teddy Corral
Success Coach Manager
tcorral@mortgagecoach.com

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