

leadPops -- Lead Follow Up Script

Hi, is this _____?

Hey _____ this is _____ with The Homebuying Team at
(Company Name) here in _____.

I've got your pre-approval inquiry and wanted to take just a few minutes to
discuss your options with you.

Before we dive in, let's just confirm a few quick things to make sure I've got
the correct information for you.

1. You're currently located in _____, right?

2. And what area(s) are you be looking to buy? _____

3. Have you owned a home in the last 3 years? YES | NO

4. Are you currently renting? YES | NO

5. What kinds of homes are you interested in: SINGLE FAMILY | CONDO |
TOWNHOME | OTHER _____

7. And how would you estimate your credit score to be? _____

-- When's the last time you had that checked? _____

8. And this -- IS / ISN'T -- your first time buying a home?

9. What kind of down payment are you hoping to make? 20% or more | LOW
DOWN PAYMENT OPTIONS -- 0%, 3%, 5%, 10%, 15% | Other: _____

10. Are you married or single? MARRIED | SINGLE | ENGAGED

11. And it says here your total annual household income is _____, correct?

12. Your employment status is: EMPLOYED | UNEMPLOYED | SELF
EMPLOYED | OTHER: _____

13. Are either you or a co-borrower:

-- a. A veteran or active member of the U.S. military? YES | NO

-- b. The surviving spouse of a military or law enforcement member? YES | NO

-- c. Native American? YES | NO

leadPops -- Lead Follow Up Script

-- d. Disabled? YES | NO

14. Do you or a co-borrower work in any of the following professions:

-- a. Law Enforcement? YES | NO

-- b. Education? YES | NO

-- c. Firefighter? YES | NO

-- d. Health Care? YES | NO

15. How many people live in your household? _____

16. What are some of the main reasons you're looking to buy a home right now?

a. _____

b. _____

c. _____

16. What's your timeline to buy? NOW | 1-3 MONTHS | 4-6 MONTHS | 7-12 MONTHS | MORE THAN 1 YEAR

17. Is your home purchase dependent on getting down payment assistance?

YES | NO

18. And you -- DO / DON'T -- already have a real estate agent?

Awesome _____, this is great stuff! Based on your answers here I definitely think we'll be able to find some programs for you, and get you into a beautiful home for at a price and rate you can comfortably afford!

Before I keep going, what questions do you have for me?

OK, great. So here's what's going to happen next:

We're going to do a simple online pre-approval application to see what you qualify for.

leadPops -- Lead Follow Up Script

That's also 100% free. There is absolutely no cost or obligation. And just to be clear:

We don't sell ANY of your information off to ANY other lenders or mortgage companies. That happens all the time in the mortgage industry, especially with a lot of these online lenders you find all over the internet.

With my company, (Company name), everything is done in-house with our expert home financing and underwriting team here locally in _____.

We're known for our "Upfront 7-Hour Underwriting Process" -- which gives you a major advantage in a crowded market, and helps prevent any last minute rushing.

Our "backwards" approach is unique, and allows you to bypass an industry full of stressful and slow lenders. Our Underwriters assess the loan and aim to have it released from Underwriting within 6 hours.

And by the way, we've been doing this for over 10 years and we have thousands of 5-star reviews from clients all over the country.

Once again, this is a free, 1:1, personalized assessment, and I've confirmed everything I need right now for us to take the next step.

Based on the info you've shared, this absolutely looks like a fit, so I'm excited for you!

And you know what? Worst case scenario is you walk away with a lot of helpful information that you can use in the down the road if you decide this isn't a good fit at this time.

So _____, we've got a couple options for your application process. Either:

a. I send you the secure online link and you can complete it on your end in about 20-30 minutes at your convenience.

-- OR --

b. We can do it together here over the phone. Again, it'll only take 10-15 minutes, but that way I can answer any questions and help you fill everything out correctly.

Do you have a few more minutes right now? YES | NO

SET A SOLID FOLLOW & INTERACTION PLAN + NEXT STEPS:

1. CONFIRM TIME & DATE
2. CONFIRM BEST EMAIL ADDRESS & CELL PHONE NUMBER

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3. SEND CALENDAR INVITE
4. SEND FOLLOW UP EMAIL (THIS SHOULD BE A SOLID TEMPLATE)
5. ADD NOTES TO CRM