

Setting Virtual Appointment via Text Message

INITIAL TEXT TO SET APPOINTMENT

This is your name, Senior Underwriter, assigned to your paperwork for the Mortgage Protection. (All those cards you've been receiving in the mail). Our records indicate that you have not received your options yet.

I'm reaching out to schedule a time to go over the information with you and co-borrower or spouse name.

Due to COVID, I can now provide this information over the phone. This will be brief. 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 AVAILABE TODAY TO PROVIDE THE MORTGAGE PROTECTION INFORMATION:

Today: 5:00pm

Tomorrow: 12:00pm or 2:00pm

《 《 《 OPTIONAL CONFIRMATION 》 》 》

APPOINTMENT CONFIRMATION TEXT

*CONFIRMATION FOR YOUR MORTGAGE PROTECTION APPOINTMENT:

Hi, their 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

Their 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?