



## **OTECTION APPOINTMENT TEXT PROCESS**

### **1. Text the client a picture of the lead 2. Send this text below:**

Hello <client first name or Mr & Mrs \_\_\_>, This is Brandon Hall with the mortgage protection division in <city or county name>. We received this letter you <or your spouse> sent back regarding your mortgage with <mortgage company name>. I'm the agent assigned to take care of this for you and your family. They have me out there either \_\_\_\_\_ or \_\_\_\_\_ to go over your options and assist you. Which <day or time> is better for you? I only need 15-20 minutes.

- 3. Once they respond, allow them to pick a day and time with you.**
- 4. Text them this - "There's a few items I need to cover in order to prepare your options- would be easier to chat for 1-2 minutes. Ok for me to call you?"**
- 5. Go into the standard Oh BTW (USE OBTW SHEET)..... So I can prepare the options for you, I need to gather some information: Any stroke, cancer, heart attack, diabetes in the past 10 years?**

Ask if there's a spouse and get their name and info if not on the lead.

Make sure the spouse will be there as well. Make sure to get directions to the house

TIE DOWN- Give them a window and make sure they know you have other families to visit and you will probably be late. Don't tell them 5pm. Tell them 5-545pm.

Ask "Do you see anything that will prevent us from meeting <day and window of time>?"