

PATLive Scripts

Phone Rings and PATLive answers:

Hello, this is Robyn Thompson's office. Are you calling to sell your house, buy a house or for some other matter?

Selling - Option #1 Script for Motivated Home Owners Calling to Sell:

Can I please have your name? _____

What is the Address of the Property? _____

What is the best contact phone number for you? _____

How many bedrooms does the house have? _____

How many baths are in your home? _____

What is the approximate square footage of your home? _____

Does your home have a garage? _____

How long have you owned the home? _____

Why are you selling? _____

How much do you owe on the property? _____

What is the monthly payment on the property? _____

Are you behind on your payments? _____

How much would your house rent it for? _____

Can you tell me how much the property taxes, insurance and HOA fees are for the property?

Taxes _____
Insurance _____
HOA Fees _____

Does the property need any repairs? _____

Thank you for all the information that you provided. Ms Thompson will be back in the office tomorrow and I will make sure she gets the information about your home. Someone will contact you about setting up a time for her to come out and view the property if she is interested.

Buying - Option #2 Script for Motivated Buyer:

Can I please have your full name? _____

Which home did you see advertised? _____

What are the best two phone numbers to call you back at?
_____ and _____

What is your current address? _____

How long have you lived there? _____

I will need to get some income and credit information from you first before we can show it to you.

Where are you working right now? _____

How long have you been employed there? _____

How much do you earn per month from your job? _____

Are you paid by the hour or are you on salary? _____

How much do you pay for rent currently? _____

Do you have any credit issues that may stop you from getting a loan? _____

I will get this confidential information to Ms Thompson immediately and someone will get back to you shortly to talk to you about setting up an appointment to look at the property that you called about.

Other Matter - Option #3 Script for Some Other Matter:

Can I please have your name? _____

What is the best contact phone number for you? _____

What is this in reference to? _____

Is this an emergency? _____

I will get your information over to Ms. Thompson's office immediately. Ms. Thompson or her secretary will give you a call back shortly.

This ends the PATLive portion of the script.

You or Your Secretary can ask these questions if there are no severe credit issues:

Have you been preapproved by a mortgage broker or loan officer in the past 30 days? If they answer yes ask them to fax or email you a preapproval letter so you can call the mortgage broker about their credit and income.

If they answer no then ask the following questions.

What is your social security number? _____

What is your date of birth? _____

Do you pay child support and/or alimony? _____.

If yes, how much per month? _____.

Do you receive child support and/or alimony _____.

If yes, how much per month? _____.

How much longer will you be receiving it? _____.

Remember: You can only count it as income if it is going to last at least 3 more years.

Is there any other income coming into the house hold like SSI or disability? _____

If yes, how much longer will it last? _____

Is there anyone else that will be going on the loan with you? _____

If yes, you must ask the co-borrower all of the same income and credit questions above.

How much money do you have saved for the down payment for the purchase of a home? _____

Is the funds in savings, checking, or is it a gift? _____