

# Incomplete Call in

Hi, \_\_\_\_\_, I'm glad I got a hold of you.

This is Jim, I am just giving you a quick call regarding your \_\_\_\_\_ mortgage you just closed over there on \_\_\_\_\_.

I am giving you a quick call, we had sent out an urgent letter to you that had a mortgage ID number that ended in \_\_\_\_\_ for you to call in to our automated line and verify some of your information. At the time of closing we have no record of it being provided to you.

I'm actually a field underwriter that was assigned to get you the mortgage protection information I am sorry to make this a 2 step process.

It appears you had called in and did not complete the automated process.

I am required to get this information to you and get this file closed.

## CONFIRM INFO

You are a non-smoker/smoker?

DO/DO NOT you have a history of heart attack, stroke, cancer or diabetes?

Ok, my job is to get this information out to you; it takes about 15 - 20 minutes.

They have me scheduled in your area on \_\_\_\_\_ & \_\_\_\_\_.

Which day works for you?

I have an opening on \_\_\_\_\_ at \_\_\_\_\_ or \_\_\_\_\_.

Ok, what I am going to do is set you up on \_\_\_\_\_ at \_\_\_\_\_.

I need to give you a special code number for the meeting to identify me.

\_\_\_\_\_ And If you could do me a big favor, if you are anything like me, if I don't write things down I don't remember if you could put that on your calendar.