

PURCHASE SCRIPT

Hi my name is _____ calling from Mortgage Associates Ontario. Am I speaking with _____ . I'm calling regarding the online inquiry you submitted requesting information for mortgage financing.

CONFIRM LEAD INFORMATION

You indicated you're looking to purchase a (**PROPERTY TYPE**) in the amount of \$_____. You also indicated you're looking to put a down payment amount of \$_____. Is this a property you have already put an offer on, or are you looking preliminarily to see how much you can get approved for?

ASK QUESTIONS ABOUT EMPLOYMENT AND CREDIT

- Q:** I see you mentioned your annual income is in the amount of \$_____. Are you currently working full time?
- Q:** Are you on a salary? Or commission, or self employed?
- Q:** How long have you been with your current employer/self-employed?
- Q:** How is your credit? Have you recently checked your credit score/report?
- Q:** Do you currently have any kind of debts? (Ie. Car loan, credit cards, LOC, student loans etc), If so what is the total amount?
- Q:** Is it just yourself purchasing this property, or is there someone else you plan on adding to the application?
- Q:** Where is your down payment coming from? (Savings, work pay, gift, RRSP's, investments etc)

CLOSING STATEMENT

Based on the information you've provided me, it look like we shouldn't have an issue getting financing in place for your new home purchase, since I work with 30 to 40 different banks and lenders. Initially, to determine which lender I can take your file to, I will need to see what your credit looks like and how things are reported, that will give me an exact idea as to which lender I can take your file to.

I need to send out a mortgage application for you to complete, and kindly return to me along with one piece of photo ID to start with. Do you have access to a printer/scanner or fax machine? (GET EMAIL OR FAX INFORMATION).

Great - Thanks. You'll receive my email/fax in the next 10 minutes with the mortgage application. If you can please kindly complete it and return to me as soon as possible, I will begin working on your file right away.

Also, do you have a pen and paper to take down my information? (PROVIDE NAME, COMPANY, EMAIL ADDRESS, PHONE NUMBER TOLL FREE OR LOCAL)