

Mortgage IVR Lead Script

Hello, is this (Client Name)?

Hey (Client Name), this is (Your Name). I am calling in regards to your mortgage with (Mortgage Lender) for your property on (Client Address). I was assigned to some paperwork a few days ago regarding your loan, the (Amount of Loan). This was in reference to the loan coverage for the property where if you passed away or became sick it would pay off the loan.

You marked your age here as (Client Age) and that you are a (non-smoker/smoker) is that correct? You also marked (Yes/No) for having a co-borrower, is it just you in the house or are you married?

Okay great.

My job very simply is I have to sign off that I got this information to you regarding the coverage for the property. Normally I would have to send someone out to the house but to keep things simple I can do this over the phone.

Are you both working full time or are y'all retired?

Perfect, what time will y'all be off work today for me to give you a quick phone call?

"4:00"

I have an opening around 5:00 PM, would that work okay for y'all?

Okay, great.

Do me a favor, make sure to save my phone number in your phone. I will be calling you back from this same number so you know it is me, again my name is (Your Name), that is (Spell Out Your Name).

Last thing, I am avoiding sending anyone out to the house so make sure to let me know if someone comes up that would make y'all unavailable. If I can't get a hold of you I do have to send this to a different department that normally comes out to the house. It is not a big deal, just let me know if something comes up. I look forward to speaking with y'all then.

Bye Bye.