



Greeting: Hello, and thank you for calling. My name is [OpName]. How may I help you today?

i. All Calls

- a. I would be happy to help you with that. I just have a few questions for you, if that's alright. May I have your first name?
- b. May I have the spelling of your last name?
- c. And what is the best number to reach you?
- d. Okay, [FirstName], are you calling to purchase or refinance a mortgage?

i. Yes (Mortgage)

1. Alright, may I have your address please?
2. Thank you, [FirstName]. Is there any other message you would like me to pass on?
3. Okay, [FirstName]. I will send your information along and have your call returned. Thank you for calling, and enjoy your day!
 - a. Send message through

ii. No

1. Thank you, [FirstName]. Is there any other message you would like me to pass on?
2. Okay, [FirstName]. I will send your information along and have your call returned. Thank you for calling, and enjoy your day!
 - a. Send message through