

## BORROWER CONTACT

*Contact borrower(s) within one (1) hour of accepting appointment.*

### Who am I? Why am I calling?

Intro  
Provide contracting company name  
Confirm or set time, date and location for appointment  
Make sure spouse is available (if applicable)

### What will happen? How long does it take?

Will be signing loan docs  
Bringing two sets  
    One to sign  
    One to keep  
Length of time depends on size of package and familiarity of process

### What do I need from them?

An hour of uninterrupted time  
Clean table for signing  
Review ID requirements  
Photocopy of ID  
Any additional items

### Review ID Requirements

Review acceptable IDs with borrowers  
Ask for each borrower's exact name printed on ID (to compare w/ names on docs)  
Make sure ID is current (not expired)

### Photocopy of ID

Let them know whether or not they need to make a copy of their ID

### Any Additional Items

Address stipulations  
Signing location off-road, cell/GPS available

### Contact Information

Provide and collect contact information  
Confirm which phone number is best to reach them

### Explain Your Role and Limitations

Duty is to help borrowers sign docs  
Can't answer questions on loan terms - is this a good deal?  
Encourage them to contact lender with questions

### End on a Positive Note

Thank borrower for time  
Look forward to meeting them

### Report Back to Contracting Company

Within one hour after closing  
Inform them of shipping location/tracking number