

Broker Phone Scripts – New Client for Purchase

Hello, . My name is

I am calling to follow up on an email I sent you recently describing a new program that I am offering. It's an innovative program designed for strong borrowers who are looking to purchase a small commercial property.

Maybe you've thought that obtaining financing for a commercial property is difficult or out of your financial reach. Does that sound like you?

Recently, my company introduced a new program for commercial loans from \$100,000 to \$2 million. The program is designed for strong borrowers with favorable credit ratings and solid personal financial strength.

Would you be interested in learning more about this product?

Great! In order to help you qualify for this opportunity, I just have to ask you a few simple questions, which won't take much time.

- 1. What type of commercial property are you looking to own?**
 - a. 5+ Unit Multifamily
 - b. Mixed-Use
 - c. Office
 - d. Retail
 - e. Warehouse/Self-Storage
 - f. Light Industrial
 - g. Automotive
 - h. Restaurant/Bar
 - i. Mobile Home Park
 - j. Daycare Center
- 2. Is this an owner-occupied property or investment?**
- 3. What is the sale price of the property?**
- 4. Is the purchase price strictly based upon real estate value (i.e. no fixtures, furniture, or equipment)? Are you including the business in the purchase price?**
- 5. When does your agreement for sale expire?**
- 6. How much down payment do you have?**
- 7. Do you know your credit scores? We will need a tri-merge credit report, so are there any credit issues we need to discuss?**

Great, I believe I have enough information to get started. What I'd like to do next is set up a meeting with you to complete the application and review your credit status. We will get you pre-qualified based on your good credit and the property you'd like to buy. So, what is a good day and time for you?