



## Broker Phone Scripts – Prior Client for Purchase

Hello, **[Borrower Name]**. This is **[Your Name]**, your loan officer. I am calling today to talk about a new product that I can offer you.

Recently, my company introduced a new commercial loan program that's designed for strong borrowers with favorable credit ratings and solid personal financial strength. Maybe you've tried to secure financing for a commercial property in the past but were discouraged by traditional lending sources? My company is offering alternative solutions from \$100,000 to \$2 million.

Are you interested in owning your own commercial property?

Excellent! In order to help you qualify for this financing, I need to run through a few simple questions with you.

- 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?