

Mortgage Broker Qualifying Call

Investor

Hello (Mortgage Broker Name), how are you today?

Investor

This is (Your Name), from (Your Company Name). Thank you for speaking with me today to answer my questions.

I want to let you know upfront that I am talking to three mortgage brokers in the area to get an idea of who is the best fit for our management style and our goals. Is it ok if I go ahead and start asking you a couple of questions?

Great! My first questions is:

1. Do you offer pre-approvals? If so, what conditions are attached to the pre-approval?
2. How long is the rate guaranteed?
3. If rates decline, how low can your final rate drop?
4. How many mortgages have you arranged in your career?
5. How many properties do your top 3 real estate investment clients own?
6. Can you give me references?
7. Where does the majority of your business come from?
8. Can you tell me about your educational background and experience in the industry?
9. What systems or procedures do you have to look after my mortgages if we move ahead?

(Mortgage Broker Name), thank you very much for your time. I have a couple more mortgage brokers to contact. Based on the information you've provided, I will contact you within the next 2 business days if you are the best fit for our company!

Thank you again for your time today. Have a great morning/afternoon/evening.