

**PROCEDURES TO FOLLOW WHEN
CONFIRMING APPOINTMENTS WITH CLIENTS
ATTACHMENT A**

Hello, my name is **[TIPIC name]** and I am calling on behalf of **[Lender's name – can usually find this info on your confirmation document]** to confirm your appointment scheduled for **[date and time of appointment]**.

The address I have on file is **[confirm the address on confirmation request]**. Should you need to contact me I can be reached at **[your contact phone number]**. Thank you and I will see you **[on the scheduled date and time]**. Have a good **[day/evening]**.

Feel free to customize this script to your style.

Other items to consider:

- Depending on the loan product and closing window, ask client if they received the Closing Disclosure.
- You can do a Google search on the address and view the residence.
- If it's a townhouse/condominium-type development, you may want to inquire about parking during the confirmation call.
- Ask borrowers to have their ID [or ID's] available.
- Wearing a mask.
- If allergic to pets, inquire during confirmation.