



## WorkCenter and Sue Woodard

### Sue Woodard English Library Forms for WorkCenter CRM

#### Email Forms:

##### Administrative E-mail

- Cold Client – Checking In
- Fax Cover Sheet
- Memo
- Original Fax Cover Sheet

##### During Purchase E-mail

- 01 Buyer Beginning Transaction
- 02 Seller Beginning Transaction
- 03 Selling Agent Beginning Transaction
- 04 Listing Agent Beginning Transaction
- 05 Buyer Midstream Transaction
- 06 Buyer Pre Closing
- 07 Buyer Post Closing
- 09 Selling Agent Post Closing
- 10 Listing Agent Post Closing
- 11 Buyer Survey Post Closing

##### During Refinance Email

- 01 Refinance Beginning Transaction
- 02 Refinance Midstream
- 03 Refinance Preclosing
- 04 Refinance Post Closing
- 05 Refinance Post Closing Thank You Note
- 06 Refinance Post Closing Survey
- 07 Refinance Settlement Statement Year End

##### email- After

- 01 – Financial Planner
- 02 – Controlling Debt
- 03- Internet Fraud
- 04 – Prepaying your Mortgage
- 05 – Home Equity
- 06 – Home Upgrade Tips
- 07 – Home Maintenance Tips
- 08 – Landscaping
- 09 – Fire Safety
- 10 – Light Upgrade Ideas1
- 11 – Light Upgrade Ideas2
- 12 – Identity Theft
- 13 – Burglar Proofing
- 14 – 401k Planning
- 15 – Protect Your Home While Traveling
- 16 – I R A Planning
- 17 – Pest Control
- 18 – Tax Consequences
- 19 – Good Credit
- 20 – Automotive
- 21 – Identity Theft-2
- 22 - Wills

## **Sue Woodard English Library Forms for WorkCenter CRM - Continued**

### **Email** – After - continued

- 23 – Investment Accounts
- 24 – I R S Audit Targets
- Mortgage Insurance
- Rate Change
- Refinance

### Email- Before

- 01 – Mortgage Interest
- 02 – Capital Gains
- 03 – Mortgage Insurance
- 04 – Title Insurance
- 05 – Mortgage Rates
- 06 – Credit Rating
- 07 – Maintenance
- 08 – Location
- 09 – Appraisal
- 10 – A P R
- 11 – Fed Funds Rate
- 12 – Financial Concerns

### Email- Bonus

- 01 – Items Needed
- 02 – Personal Brochure
- 03 – Pre-Approval Certificate
- 04 – Refinance Items Requested
- 05 – Pre- Approval Info Letter
- 06 – Purchase Info Cover Letter
- Cold Client – Checking In

### **Print Letters:**

#### Admin Instructions

- Recommended frequency of mailings

#### Labels - Print

- Contact Label
- Envelopes #10
- R E Agent Label

#### Letter – After

- 01 – Financial Planner
- 02 – Controlling Debt
- 03 – Internet Fraud
- 04 – Prepaying Your Mortgage
- 05 – Home Equity
- 06 – Home Upgrade Tips
- 07 – Home Maintenance Tips
- 08 – Landscaping
- 09 – Fire Safety
- 10 – Light Upgrade Ideas1
- 11 – Light Upgrade Ideas2
- 12 – Identity Left
- 13 – Burglar Proofing
- 14 – 401k Planning
- 15 – Protect Your Home While Traveling
- 16 – I R A Planning
- 17 – Pest Control
- 18 – Tax Consequences
- 19 – Good Credit
- 20 – Automotive
- 21 – Identity Theft – 2
- 22 – Wills
- 23 – Investment Accounts
- 24 – I R S Audit Targets

# **Sue Woodard English Library Forms for WorkCenter CRM - Continued**

## Letter – After - Continued

- Mortgage Insurance
- Rate Change
- Refinance

## Letter – Before

- 01 – Mortgage Interest
- 02 – Capital Gains
- 03 – Mortgage Insurance
- 04 – Title Insurance
- 05 – Mortgage Rates
- 06 – Credit Rating
- 07 – Maintenance
- 08 – Location
- 09 – Appraisal
- 10 – A P R
- 11 – Fed Funds Rate
- 12 – Financial Concerns

## Letter – Bonus

- 01 – Items Needed
- 02 – Personal Brochure
- 03 – Pre- Approval Certificate
- 04 – Refinance Items Requested
- 05 – Pre- Approval Info Letter
- 06 – Purchase Info Cover Letter

## During Refinance Letter

- 01 Refinance Beginning Transaction
- 02 Refinance Midstream
- 03 Refinance Preclosing
- 04 Refinance Post Closing
- 05 Refinance Post Closing Thank You Note
- 06 Refinance Post Closing Survey
- 07 Refinance Settlement Statement Year End

## During Purchase Letter

- 01 Buyer Beginning Transaction
- 02 Seller Beginning Transaction
- 03 Selling Agent Beginning Transaction
- 04 Listing Agent Beginning Transaction
- 05 Buyer Midstream Transaction
- 06 Buyer Pre Closing
- 07 Buyer Post Closing
- 08 Buyer Post Closing Note Card
- 09 Selling Agent Post Closing
- 10 Listing Agent Post Closing
- 11 Buyer Survey Post Closing
- 12 Settlement Statement Year End
- 13 Buyer One Year Anniversary

## Administrative Print

- Cold Client – Checking In
- Fax Cover Sheet
- Memo
- Original Fax Cover Sheet

## Planning Documents Print

- Action Plan
- Ideas On Creating Your Own Corporate Account Book
- Ideas On Creating Your Own Playbook
- Ideas On Creating Your Own Reference Sheets
- Sample Corporate Book
- Sample Corporate Book 2
- Sample Hot Sheet
- Using Mortgage Market Guide Weekly