



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



WorkCenter and Sue Woodard

Sue Woodard Spanish Library Forms for WorkCenter CRM

Print Letters:

Letter – After

- 01 - Financial Planner - Spanish
- 02 – Controlling Debt – Spanish
- 03 – Internet Fraud – Spanish
- 04 – Prepaying Your Mortgage – Spanish
- 05 – Home Equity – Spanish
- 06 – Home Upgrade Tips – Spanish
- 07 – Home Maintenance Tips – Spanish
- 08 – Landscaping – Spanish
- 09 – Fire Safety – Spanish
- 10 – Lighting Upgrade Ideas – Spanish
- 11 – Lighting Upgrade Ideas 2 – Spanish
- 12 – Identity Theft – Spanish
- 13 – Burglar Proofing – Spanish
- 14 – 401 K Planning – Spanish
- 15 – Protect Your Home While Traveling – Spanish
- 16 – I R A Planning – Spanish
- 17 – Pest Control – Spanish
- 18 – Tax Consequences – Spanish
- 19 – Good Credit – Spanish
- 20 – Automotive – Spanish
- 21 – Identity Theft – Spanish
- 22 – Wills – Spanish
- 23 – Investment Accounts – Spanish
- 24 – I R S audit Target – Spanish
- Arm Change Date – Spanish
- Mortgage Insurance Removal – Spanish
- Refinance Solicitation – Spanish

Letter – Before

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

Sue Woodard Spanish Library Forms for WorkCenter CRM-Continued

Print Letters:

Letter – During Purchase

- 01 – Buyer – At beginning of transaction – Spanish
- 02 – Seller – At beginning of transaction – Spanish
- 03 – Selling Agent – At beginning of transaction – Spanish
- 04 – Listing Agent – At beginning of transaction – Spanish
- 05 – Buyer – Midstream transaction – Spanish
- 06 – Buyer – Pre-closing – Spanish
- 07 – Buyer – Post Closing – Spanish
- 08 – Buyer – Post Closing Note Card – Spanish
- 09 – Selling Agent – Post Closing – Spanish
- 10 – Listing Agent – Post Closing – Spanish
- 11 – Buyer Survey – Post Closing – Spanish
- 12 – Settlement Statement – Year End – Spanish
- 13 – buyer One Year Anniversary Note Card Reminder

Letter – During Refinance

- 01 – At Beginning of Transaction – Spanish
- 02 – Midstream – Spanish
- 03 – Pre-closing – Spanish
- 04 – Post Closing – Spanish
- 05 – Post Closing Thank You Card – Spanish
- 06 – Survey Post Closing – Spanish
- 07 – Settlement Statement Year – Spanish

Letter – Miscellaneous

- Items Requested - Spanish
- Personal Brochure – Spanish
- Pre – approval Certificate – Spanish
- Refinance Items Requested - Spanish