



*"I realized to be successful in the reverse mortgage business it would take a longer time for senior clients to make up their minds to do a reverse mortgage. From the beginning it was essential to have a contact management system. A system that allowed me to track my senior data base, but I also needed a CRM that was easy to use, affordable and would integrate my proven content. I was able to find Work Center CRM. WorkCenter understands what it takes to be successful in the reverse mortgage industry, with technology that really works. If you are looking for a contact management database for your reverse mortgage operation that integrates your content and database, then I highly recommend WorkCenter CRM, by the makers of vForms. Every morning you log in and with just a few clicks you know exactly what you are doing and when to do it. To me, customer support was highly important, and you get it with WorkCenter, plus ease of use topped the list. I did not want a CRM system that turned users off, by saying this is too difficult to use and WorkCenter definitely fits the criteria I wanted and expected. Now the perfect combination, WorkCenter + SCM Content Package = Success. This team will add to your success by integrating campaigns and content to help you nurture, build and create synergies with your senior clients. "*

*Sam Collins*

Yes, **SUCCESS** is at hand – you, Sam Collins and Work Center – a winning combination!

Sam Collins complete content package includes: emails, letters, reports, forms, all organized with logical approaches to steps in the reverse mortgage process. You get set campaigns "done for you" to provide marketing materials to your senior clients before, during and after your reverse mortgage loan closes. You will be head and shoulders above your competition, with Work Center and Sam Collins Content Library, you will find:

- A complete set of **letters, emails, reports, guides, self help guides and forms.**
- Your **corporate logo** and **personal contact information on each letter and email.**
- Personalized with **your individual senior client information**, populated automatically. No more cross referencing and searching for the right address. Once and done.



- Pre-formatted **e-mail messages** and **mail merge letters** for direct and e-mail marketing. Gently nudge your client with important information, all the while building rapport and relationship.

What about my current database? No worries, WorkCenter allows a seamless import of your data base. It's so easy and so important to have this ability, saving you time and money.

Action Plans are easy to use and require no more than a couple mouse clicks each morning! You control the flow, you control the effort, and you become the WINNER! WorkCenter is the only CRM (Contact Relationship Management) tool you need to help manage your senior client data to create more originations and have your clients recommending you to others.

Contact your Business Development Officer at vForms for pricing information on **Work Center** and the **Sam Collins complete content Lead Nurturing Package TODAY!**

## **Reverse Mortgage Lead Nurturing Package**

### **Email Sequence Nurturing to New Lead Prospects**

- 1 - The Information You Requested**
- 2 - Just For You**
  - 2a- Phone Call (Use Script #1)*
- 3 - Guard Your Senior Years with the Security and Safety You Deserve**
- 4 - A Certified Planner Can Help You with Your Retirement**
  - 4a- Phone Call (Use Script #2)*
- 5 - The Top Ten What Ifs . . . .**
  - 5a- Phone Call (Use Script #5)*
- 6 - Preserve Your Assets . . .**
  - 6a -Phone Call ( Use Script #6)*
- 7 - Insufficient Retirement Planning (Free Report)**
- 8 - Longevity (Free Report)**



### **Follow-Up Lead Nurturing New Lead Prospects (*Letters and Phone Call Sequence*)**

- 1 - Thank you for requesting your free information. (*includes Q & A Form*)**
  - 1a. Phone Call using Script #1*
- 2 - How to live to be 109 . . .**  
**(*includes Report "10 Tips to Improve Your Memory"*)**
  - 2a. Phone Call using Script #2*
- 3 - Certified Planner or other professional can Protect Your Cash**  
**(*includes Report-"Longevity"*)**
  - 3a Phone Call using Script #3*
- 4 - Top Ten Things Your Should Consider About a HECM**
  - 4a Phone Call using Script #4*
- 5 - New Reality . . . Living Longer**
  - 5a Phone Call using Script #5*
- 6 - Preserve Your Assets (*includes Report – "Are You Prepared"?*)**
  - 6a Phone Call using Script #6*
- 7 - Now May Not Be the Time**
  - 7a Phone Call using Script #7*
- 8 - Ring Letter**
  - 8a Phone Call using Script #8*

### **Caregiver Lead Nurturing Sequence**

- 1 - Letter to Caregiver after inquiry (*includes Q & A Form*)**
  - 1a – Phone Call using Script #1*
- 2 - Letter to Financial Advisor after inquiry**
- 3 - Questionnaire Form**

### **Lead Nurturing Confirmation of Appointment**

- 1- Letter of Appointment Confirmation**
  - 1a – Phone Call to confirm appointment*



### **Lead Nurturing Confirmation of HUD Counseling (*Letter and phone call sequence*)**

- 1 - HUD Counseling Letter (Schedule appointment)**
  - 1a - Phone Call to FU to see if counseling scheduled (Use Script #1)*
- 2 - HUD Counseling Letter (FU to check on counseling certificate)**
  - 2a - Phone Call to FU about counseling certificate (Use Script #1)*
- 3 - Title Order Letter**
  - 3a - Phone Call to update*
- 4 - Settlement and Funding Request Letter**
  - 4a - Phone Call to schedule loan closing (Use Script #2)*

### **Lead Nurturing after Loan Closing (*Letter and phone call sequence*)**

- 1 - Letter after Closing**
  - 1a. Client Satisfaction Questionnaire*
  - 1b. Testimonial Request Form*
- 2 - Thank You Card (*handwritten*)**
- 3 - 60 Day Follow Up Letter**
  - 3a. Phone Call (Use Script #1)*
- 4 - One Year Anniversary Letter**

### **Lead Nurturing Thank You for Referrals**

- 1 - Thank You Letter to Ask for Referrals**
  - 1a. - Phone Call*
- 2 - How to Get Referrals from Satisfied Senior Clients**
  - (Free Report for Reverse Mortgage Professionals)*



## **Additional Reports and Forms to use in your Lead Nurturing**

- Lead Flow Chart
- Senior Client Information Form
- Worksheet for Seniors (*This is an excel spreadsheet*)
- Question and Answers Form
- Myths and Realities of a Reverse Mortgage (HECM)
- Choosing a Counselor
- 10 Reasons You May Not Qualify
- Advantages and Disadvantages of a Reverse Mortgage
- Are You Well Prepared?
- Be Assured You Are Protected
- Owing Money Is Not Fun
- Tips to Improve Your Memory
- Financial Risks Information
- Four Steps to a More Secure Retirement Plan
- Longevity
- Professional Financial Advisors
- Protect Your Home While You Are Away
- Process from Start to Finish
- Reverse Mortgage Terms

*(You can give any of the above reports to your senior clients as Free Reports.)*