



## Client Consultation Assignment 2: E-Mail Template for Pre-Qualification



**Directions:** Use the template below to contact your client via e-mail and give them their loan pre-qualification information.

**To:** carefully type your client's e-mail address

**Cc:** type: awalter@aobt.net and erush@aobt.net

**Subject:** Your loan pre-qualification (AOBT Real Estate Project)

 **File Attachment:** Loan\_Prequalification\_client\_name.pdf

**Text of E-mail:** *(Write something that sounds similar to the following message. You may personalize it, but be sure to keep it short and **professional!** PROOFREAD 3 TIMES BEFORE SENDING!!!)*

Dear Mr. or Ms. (type client's last name):

We enjoyed meeting with you for our first consultation! We are working hard to begin the process of finding you a home that meets all of your needs.

Throughout the next few weeks, we will be periodically contacting you by email and phone to update you on our findings and ask for your feedback.

Using the information you gave us at the consultation, we submitted your loan pre-approval application to a loan officer from California Coast Credit Union. We believe this lender will offer you the best rates and service on your home loan. The loan officer ran a credit check and also did a pre-qualification for you. Attached, you will find your personalized loan pre-qualification letter with information about your FICO, interest rate, and home loan.

You will also see that we have calculated your maximum home price at \$\_\_\_\_\_ (based on your loan amount and down payment) and your monthly payment at that max home price at \$ \_\_\_\_\_. Please look over the letter and then reply to this e-mail to let us know the home price range you are most comfortable with, so we can begin finding some great options for you.

We look forward to hearing from you soon!

Sincerely,

(type your full names)

(type the name of your real estate agency)