



Developing Collaborative Relationships with Your Lender

Lender: _____
 Contact Info: _____
 Client(s): _____
 File Number(s): _____

1. **Best Communication Method:** What is the best way to get in touch with you?
 Phone Email Text Other _____

2. **How Often You Should Make Contact:** Should I check in with you once or twice a week? _____

3. **Expectations:** What do you think I should know about how you work that would be helpful for you?

4. **Logistics:** What time zone are you in and what hours are you in the office?
 Eastern Central Mountain Pacific
 Hours: _____ AM to _____ PM

5. **Personal Information:** For example, children's / spouse names, pets, etc.

6. **Collaboration:** Here's what I am looking for: release of lien, complete and full satisfaction of the debt on this mortgage and with waiver against any further pursuit of deficiency. How can we work together to make this happen?

7. **Understanding:** Here's what I am looking for: release of lien, complete and full satisfaction of the debt on this mortgage and with waiver against any further pursuit of deficiency. How can we work together to make this happen?

8. **Open Communication:** What could you share with me today, that we haven't discussed yet that will make it easier for me to get us to the closing table?

9. **A Timeline:** At the closing of a conversation: "Based on where we are right now, would you suggest I call you at the end of this week, or would the middle of next week be better?" _____