

## **Script #1 Equity247 web application**

(borrower name),

Thank you very much for the opportunity to earn your business. I truly appreciate it. I understand that buying a new home while exciting can also be a stressful time. I want to make the process as smooth as possible for you and help you through each step!

To get things started, I will be sending you a link to our secure online portal, Equity247. The Equity247 portal is where you will complete your loan application, review and sign all your loan disclosures, and a way for you to send us requested documentation in an easy-to-use platform. This is the most secure way to exchange information because of the program's encryption capabilities. You will be requested to create a password for Equity247 and it is important to remember your password as we continue to communicate via the portal as we go through the mortgage process. Finally, our Equity247 program allows you to securely integrate with your bank to download your asset statements digitally if you so choose. This is a lot easier than printing, copying, and send all the pages within a bank statement.

To get started, click on the "apply now" link below in my email signature. If you would prefer that I text the link to you, please let me know.

## **Script #2 Equity247 Script for a NON web app / post submission**

(borrower name),

Thank you very much for the opportunity to earn your business. I truly appreciate it. I understand that buying a new home while exciting can also be a stressful time. I want to make the process as smooth as possible for you and help you through each step!

To get things started, I will be sending you an email with a link to 'Activate your Equity247 loan hub' on our secure online portal. The Equity247 portal is our way to send you all your loan disclosures and a way for you to send us requested documentation in an easy-to-use platform. This is the most secure way to exchange information because of the program's encryption capabilities. You will be requested to create a password for Equity247 and it is important to remember your password as we continue to communicate via the portal as we go through the mortgage process. Finally, our Equity247 program allows you to securely integrate with your bank to download your asset statements digitally if you so choose. This is a lot easier than printing, copying, and send all the pages within a bank statement.

Here are the exact directions for Activating your Equity247 loan hub...

1. You will be receiving an email to set up your Equity247 portal. The subject of that email will say '*Activate your Equity247 loan hub to manage documents online*'.
2. Go into the email and click the link, '*Activate loan hub*'. This will direct you to a webpage where you will set up your password.
3. Create and then confirm your password, then click '*Activate*'. You will then be directed to Terms of Use Agreement.
4. Click '*Agree*'. After that you will be directed to your portal.

5. You are automatically taken to the Getting Started task. Click '*Start this section*' and answer all the subsequent questions.
6. After all questions have been answered, you will be directed to sign your eConsent which is your consent to do business with us electronically. Click '*Start this section*' and then '*I have read and consent*'.
7. After you have eConsented, your portal is properly setup and we can now send you documents to sign.
8. All of your initial mortgage disclosures will be coming to you through the portal. You will receive an email when they are ready with the subject '*Initial Disclosures*'. Within the email there will be a link to click ('*Review Disclosures*') that will direct you to your Equity247 login screen so you can sign your disclosures.

Thanks again and I look forward to helping through the mortgage process! Reach out with any questions you may have!