

Loss Mitigation Call Sheet



For members. For life.

Our loss mitigation department will be giving you a lot of important information. These sheets will help you keep track of your conversations and note items to follow up on. Please write down any question you might have before or after each call, so you can get the most out of our conversations.

Preparing for your first call to our loss mitigation department

Have your loan number ready. You can find it on your payment coupons.

My loan number: _____

When you call, be prepared to tell us about your situation.

"I was recently laid off and I don't think I'll be able to make my mortgage payments. Is there anything we can do to make them more affordable?"

My questions (before the call)

Date of the phone call: _____ Representative's Name: _____

Notes / Action Items

Follow-up Questions to ask during the next conversation.

Please feel free to reprint this page as many times as you need. It's important to keep track of our conversations and action items.

Date of the phone call: _____ **Representative's Name:** _____

Notes / Action Items

Follow-up Questions to ask during the next conversation.

Date of the phone call: _____ **Representative's Name:** _____

Notes / Action Items

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