**Hello, this is \_\_\_\_\_\_\_\_\_ calling from TMM Group.**

**I was contacting you back in response to: ad, email, phone message”**

**Ask the owner to tell you a little bit about their business and how much in funding are they seeking?**

**Then just say, great, may I ask you a few questions that will help us determine what funding product would work best for you?**

**Ask them the following Questions: What is your first and last name?**

**INTAKE QUESTIONS**

|  |  |
| --- | --- |
| 1. How long have you been in business? |  |
| 1. What is your monthly income from the business? |  |
| 1. Do you know what your credit score is? |  |
| 1. Do you own any real estate? |  |
| 1. What is the best number to reach you? |  |
| 1. My I get your email address? |  |

Then you can simply say, I am going to have our Funding Partner look over your info and we can contact you back shortly with a few funding options. When is the best time to reach you?

Perfect. I will get back to you today. Thank you and have a nice day.

Partner/Consultant: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_