

## Post-Closing Contacts – Realtors

### 1. Two-day follow-up: Auto-Text

“Hi! Enjoyed working with you on the [borrower name] transaction. Were there any surprises or unmet expectations? Thanks again! – [LO Name]”

### 2. Two-week follow-up: Auto-Text

“Can you believe it’s already been two weeks since our last deal together closed? How are things going? – {LO Name}”

### 3. One-month follow-up: Auto email

Subject: Happy 1-Month Anniversary for [Borrower Name]  
Hi {realtor name},

Did you know that only 18% of realtors & loan originators follow up with their customer post-closing? I know it’s hard, always having to focus on the next deal.

Anyway, I find it really helpful for generating referrals to check-in with clients post-closing, so I wanted to drop you a friendly reminder that it’s the 1-month closing anniversary of the [borrower name] transaction. I’m sure they’d love to hear from you.

Hope you’re well, and I’m never too busy for your referrals! Do you have anything I can help you with?

Sincerely,

[LO Name]

### 4. Six-Month follow up: Auto email reminder to realtor it is the 6-month anniversary.

Happy 6-Month Anniversary for [Borrower Name]

Hi {realtor name},

Did you know that only 18% of realtors & loan originators follow up with their customer post-closing? I know it’s hard, always having to focus on the next deal.

Anyway, I find it really helpful for generating referrals to check-in post-closing, so I wanted to drop you a friendly reminder that it’s the 6-month closing anniversary of the [borrower name] transaction. I’m sure they’d love to hear from you.

Hope you're well, and I'm never too busy for your referrals! Do you have anything I can help you with?

Sincerely,

[LO Name]

5. Anniversary of closing: Auto email reminder to realtor it is the 12-month anniversary. This happens annually.

Subject: Happy Anniversary

Hi {realtor name},

Did you know that only 18% of realtors & loan originators follow up with their customer post-closing? I know it's hard, always having to focus on the next deal.

Anyway, I find it really helpful for generating referrals to check-in post-closing, so I wanted to drop you a friendly reminder that it's closing anniversary of the [borrower name] transaction.

Hope you're well, and I'm never too busy for your referrals! Do you have anything I can help you with?

Sincerely,

[LO Name]

6. Borrower birthday: Auto Email reminder to realtor that it is Borrower / Buyer birthday. This happens annually.

Subject: Happy Birthday to [Borrower Name]

Hi {realtor name},

How's business going? I noticed that [Borrower Name}'s birthday is on [x date]. Wanted to drop you a friendly reminder, I'm sure they'd love to hear from you.

Hope you're well, and I'm never too busy for your referrals! Do you have anything I can help you with?

Sincerely,

[LO Name]

7. Wedding anniversary: Auto Email reminder to realtor that it is the buyer / borrower wedding anniversary. This happens annually.

Subject: Happy Wedding Anniversary to the [Borrower Last Names]

Hi {realtor name},

How's business going? I noticed that {Borrower First Name & Borrower First Name & Last Name} have their wedding anniversary on [x date]. Wanted to drop you a friendly reminder, I'm sure they'd love to hear from you.

Hope you're well, and I'm never too busy for your referrals! Do you have anything I can help you with?

Sincerely,

[LO Name]

## Post-Closing Contacts – Borrowers

1. Two-day follow-up Auto Text:

Hi! How's everything going?

I loved working with you, thanks again for your business. Were there any surprises or unmet expectations?

Anything I can help you with? – [LO Name]

2. Two-week follow-up: Call: Are they starting to get unpacked / getting pictures up on the walls? Do they have any questions about where to send their payments or how the loan works? Do they have everything they need?

3. One-month follow-up Auto Text:

Happy 1 month anniversary! How's the new house working out? Anything I can help you with? – [LO Name]

4. Three-month follow-up Auto Text:

Hi! Was just thinking about you today, how's everything going with the house? – [LO Name]

5. Six-Month follow up Auto-Text:

Hi! Can you believe it's been 6-months since we closed on your house? Happy Anniversary! Just wanted to say hi and thanks again for the business – [LO Name]

6. Anniversary of closing Auto-Text:

Happy House Anniversary! How's everything going? – [LO Name]

7. Her birthday: Auto-Text to remind him three days prior to her birthday:

Happy birthday to [spouse first name] ... friendly reminder it's in three days – [LO Name]

8. Her birthday: Auto-Text:

Happy Birthday! I hope you have a wonderful day! How's the house? – [LO Name]

9. His birthday: Auto-Text to remind her three days prior to her birthday:

Happy birthday to [spouse first name] ... friendly reminder it's in three days –  
[LO Name]

10. His birthday: Auto-Text:

Happy Birthday! I hope you have a wonderful day! How's the house? – [LO Name]

11. Wedding anniversary. Auto-Text to remind him three days prior to the anniversary.

Happy anniversary ... friendly reminder it's in three days ☺ - [LO Name]

12. Wedding anniversary (sent to both). Auto-Text:

Happy Anniversary! How's everything going? – [LO Name]

13. Children's Birthdays (sent to both borrowers, if applicable):

Please say Happy Birthday to [Child's Name] for me!! Hope it's a wonderful day!  
– LO Name