



Call Information Sheet

Our specialist will be giving you a lot of important information. It is a good idea to take notes for future reference. We have also provided space to write down any questions you may have before or after the call, so that you can get the most out of each conversation.

Preparing for your first call with a specialist

Have your loan number ready. You can find it on your home loan statement.

My loan number: _____

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

“I just got laid off and am worried I may not be able to make my home loan payments soon. Is there anything we can do to make them more affordable.”

Date of phone call: _____ **Specialist name:** _____

My questions (prior to the call)

Notes / Things to do (ex: Get my last employer’s phone number to verify my last day of work.)

Follow-up questions (ex: How do I update my application with the income from my new job?)

It is important to take notes on all your calls, so reprint this page as many times as you need.

Date of phone call: _____ **Specialist name:** _____

Notes:

Follow-up questions:

Date of phone call: _____ **Specialist name:** _____

Notes:

Follow-up questions:

Date of phone call: _____ **Specialist name:** _____

Notes:

Follow-up questions:
