

MESSAGES / EMAIL / VOICEMAIL

Text message templates

Use only for permitted outreach. Replace every bracketed field and honor requests to stop.

After a requested call

Hi [Name], this is [Your name] with [Business]. Thanks for speaking about [Property]. The next step we agreed is [Step]. Would [Time] work?

Request missing details

Hi [Name], to continue the property review, could you share [Specific detail]? Please do not send account numbers or other sensitive information by text.

Appointment confirmation

Hi [Name], confirming [Actual appointment type] for [Date/time] at [Property]. Please reply to confirm or suggest another time.

Close the loop

Hi [Name], checking whether you would still like us to continue the review of [Property]. If your plans have changed, let me know and I will update our records.

Opt-out confirmation

Understood. I have recorded your request and will stop this outreach. Thank you for letting me know.

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Email templates

Describe your actual role and process. Avoid promises about fees, funding, outcomes or timing that have not been agreed.

Property review summary

Subject: Next steps for [Property]

Hi [Name],

Thank you for discussing the property. My notes are [Short factual summary]. To continue the review, we need [Missing details]. The next step is [Action] by [Agreed time]. Please correct anything I have misunderstood.

[Your name]

[Business / actual contact details]

Sensitive situation / inherited property

Subject: Your property review request

Hi [Name],

Thank you for reaching out about [Property]. We can start by understanding your goals, the condition and the people authorized to make decisions. You can share only the details you are comfortable discussing. Questions about probate, title or authority should go to your attorney or closing professional. Would [Time] suit a conversation?

[Your name / Business]

Follow-up after research

Subject: Review update for [Property]

Hi [Name],

We have completed [Actual work completed]. The assumptions are [Assumptions], and we still need to verify [Items]. If you would like to proceed, the next step is [Step]. Let me know your questions or a convenient time to talk.

[Your name / Business]

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Voicemail templates

Keep messages brief and use your actual business phone number when you personalize the template.

Initial voicemail

Hi [Name], this is [Your name] with [Business] calling about [Property]. If you would like to discuss it, you can reach me at [Phone]. Again, [Your name] at [Phone]. Thank you.

After a requested follow-up

Hi [Name], [Your name] with [Business], following up at the time we discussed about [Property]. Please call [Phone] when convenient, or let me know if your plans have changed.

Appointment or next-step reminder

Hi [Name], this is [Your name] with [Business]. I am calling to confirm [Actual next step] for [Date/time]. You can reach me at [Phone] to confirm or reschedule.

Before using a template

Check names, property, role, consent or other permitted contact basis, the facts of your process and the agreed next action. Do not include confidential property-owner or financial information in a public example.

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Quick reply library

Adapt the answer to the facts. These short replies are prompts for a conversation, not a substitute for research.

Who is this?

I am [Your name] with [Business]. My role is [Actual role]. I am contacting you about [Property].

Where did you get my details?

Our record shows [Actual source]. I can correct the record and stop contacting you if you prefer.

What is your offer?

First we need to confirm the property details and review comparable sales. Any initial range would be preliminary.

The asking price is firm

Thank you. I will use that expectation in the review and let you know whether our approach appears to fit.

The property is rented

What are the lease dates and access arrangements? Please share tenant information only through an appropriate secure process.

Already sold / under contract

Thank you for the update. I will update our records and close this follow-up.

Not ready to sell

Understood. Would you prefer no further contact, or is there a specific time and method you would welcome a follow-up?

Are you an agent?

My actual role is [Role / license status]. I will explain whom I represent and what service I am offering.