

PRE-SETTLEMENT
SAMPLE INTERVIEW QUESTIONS

Prospect Name _____

Source Transaction _____ File # _____

Where do you currently direct most of your business?

Do you have a favorite provider?

If so, who or what company? _____

Is there anything they do that you especially like or appreciate?

If there is one thing your favorite provider could add to their service, what would that be?

Here is the contact information of the person who will process your file.

Processor Name _____

Phone _____ email _____

Do you have any specific requests that you'd like me to communicate to our processor?

Is there anything additional or unique about this transaction or about your client(s) you'd like to be sure I'm aware of or that I pay special attention to?

We will be providing you with weekly updates on this transaction. Do you have a preference on how we communicate these updates to you?

Phone _____

Email _____

Text _____