

INTRODUCING BORROWERS TO ACCOUNTCHEK® IS SIMPLE

Need a cheat sheet? Try this 60-second script:



LOAN OFFICER:

Our customers have told us how much of a hassle it is sending paper or PDF statements to document their finances. So, we're using a new technology called AccountChek to verify your assets for the loan. It's a paperless, automated process that only takes a few minutes and speeds up our loan approval process. The best part is that it's actually more secure than the old way of faxing or emailing!

Do you use online banking?



BORROWER:

Of course!



LOAN OFFICER:

Perfect.

I just sent you an email and a text message inviting you to verify your banking, retirement and investment assets using AccountChek. You can use either one to get started.

The email comes either from us or AccountChek. If it's not in your inbox, you might want to check your junk folder. The text message will say "Asset Verification Request."

You can verify your assets right now on your smart phone, or later on any device. Which do you prefer?

NOW

LATER



BORROWER:

Let's do it now.



BORROWER:

I'll do it at home.



LOAN OFFICER:

Good! Just open the email or text message to get started.

You don't need any account numbers or bank statements – just the names of your financial institutions and your login credentials.



LOAN OFFICER:

Great. When you are ready, just open the email or text message to get started. The process will only take a couple of minutes.

You don't need any account numbers or bank statements – just the names of your financial institutions and your login credentials.



LOAN OFFICER:

Rest assured, we only receive the data relevant to your loan. We trust AccountChek because it's super secure. No one in our organization or anywhere else can access or see your account credentials.

Here's some information about the process in case you have questions. [Give your borrower the one-page "AccountChek Borrower Overview" info sheet]!