



CERTIFIED DISTRESSED
PROPERTY EXPERT®

Developing Collaborative Relationships with Your Lender Worksheet

Lender: _____

Contact Info: _____

Client(s): _____

File Number(s): _____

1. **Best Communication Method:** What is the best way to get in touch with you?
 Phone Email Text Other _____

2. **How Often You Should Make Contact:** Should I check in with you once
or twice a week? _____

3. **Expectations:** What do you think I should know about how you work
that would be helpful for you? _____

4. **Logistics:** What time zone are you in and what hours are you in the office?
 Eastern Central Mountain Pacific
Hours: _____ AM to _____ PM

5. **Personal Information:** For example, children's/spouse names, pets, etc.

6. **Collaboration:** Here's what I am looking for: release of lien, complete and full satisfaction of the debt
on this mortgage and with waiver against any further pursuit of deficiency. How can we work
together to make this happen? _____

7. **Understanding:** What are the phases of the process that I'll be handling with you, and where will the
file go when it leaves your desk? What do you think the time span will be between now and the
final decision? _____

8. **Open Communication:** What could you share with me today, that we haven't discussed yet that will
make it easier for me to get us to the closing table? _____

9. **A Timeline:** At the closing of a conversation: "Based on where we are right now, would you suggest I
call you at the end of this week, or would the middle of next week be better?" _____