

## Mortgage Leads Order Form

Please fax the completed form to Order Processing at: 1-888-400-0799

Name: \_\_\_\_\_ Email: \_\_\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Phone #: \_\_\_\_\_ Fax#: \_\_\_\_\_

**Please select only one (services are subject to different rates)**

Reverse Mortgage  Appointments only

Minimum order is 15

Mortgage Refinance  Phone Leads only

Minimum order is 20

B Leads for RM  Leads only | MR  Leads only

Minimum order is 20

Desired State for leads: \_\_\_\_\_ Desired Cities: \_\_\_\_\_

Date of Appointments to start: \_\_\_\_/\_\_\_\_/\_\_\_\_

# of Leads requested:  15  20  (other) \_\_\_\_\_

Desired days to work:  Mon.  Tue  Wed  Thurs  Fri  Sat

# of Appointments requested per day: \_\_\_\_\_

Appointment Start time: \_\_\_\_\_:\_\_\_\_\_ AM PM (**circle**)

Time in between Appointments:  1 hour  1 ½ hours  2 hours  3 hours

**COMMENTS:** \_\_\_\_\_

# Mortgage Leads Service Agreement

2033 W. McDermott Rd. Suite 320 #274

Allen, TX 75013

Office: 1-877-384-9494

Fax: 1-888-400-0799

Thank you for requesting pre-set appointments and phone leads. **Telemarketing Sales Lead™ (TSL)** starts every new Agent/Broker relationship with an agreement. This Agreement spells out what you can expect from us, and what we expect from you.

There are some important points we would like to address regarding our services. You must Read and Agree to the **TSL** terms and conditions including any future amendments (collectively, the "Agreement") prior to placing your order request:

## All orders are subject to the following Terms and Conditions:

***TSL GUARANTEE: In case TSL receives a report of a "non scheduled appointment" TSL guarantees to provide the client with the telephone conversation recording; otherwise the "deficient" Lead will be replaced with no questions asked.***

## REPLACEMENT POLICY

You understand and agree **Telemarketing Sales Lead™** will not replace the following appointments:

- The Agent calls the appointment ahead in which can result in lead changing their mind.
- Leads that miss the appointment or is not at home at the scheduled time.
- Leads changed their mind at the door.
- If a "bad" appointment with a detailed description has been forwarded to **TSL** Quality Control for review **after** 24 hours of the agent running the appointment.

Replacement Leads will not be given in the event the subject of the Lead: changes their mind at the time of call ahead or 'at the door'; misses the appointment or are not home at the appointed time; does not have a low mortgage balance, senior is not residing in a single family home or a 1 -4 unit home with one unit occupied by the borrower or if the Buyer fails to give notice within the time period specified above. All Leads are based on a recorded telephone conversation where the information TSL receives are verified for accuracy. TSL believes that it has compiled and developed high value information and appointment setting service, however, the Leads are provided on an "as is" basis. Customer agrees and acknowledges that TSL shall not be liable for any loss or injury caused in whole or in part by contingencies beyond its control. TSL will not refund any amounts paid for the Leads. In the event a Lead is flawed because the person does not live at the address given or the appointment has not been set, a replacement Lead will be provided to the Buyer, provided, however, that Buyer must provide written notice of the flaw to TSL within twenty four (24) hours of the appointment and TSL must concur that such Lead was flawed. TSL uses a third party verification service to investigate any such flawed Leads. A false claim of a flawed Lead will be deemed an event of default under this Agreement. TSL obtain their leads through a private vendor generation service. TSL is not required to provide vendor generation information to the Agent. Each month our leads are scrubbed against the FTC and State Attorney General Do Not Call lists. At the time of purchase, all consumer leads with phone numbers are privacy-compliant. Over time, people may add themselves to the Do Not Call list and it is ultimately the responsibility of the client to remove these names before calling.

## Federal Regulations and Compliance for Loan Officers and Mortgage Brokers:

Every Loan Officer/Mortgage Broker involved in the solicitation, selling, or negotiation of Mortgage related products and services must have a State issued license and must maintain compliance within their state of business through all applied federal regulations. Each Loan Officer and/or Mortgage Broker must be in compliance with: Equal Credit Opportunity Act; Annuity Disclosures for Reverse Mortgages; Notice Regarding Your Right to an Appraisal Report; (RESPA) Disclosures; Good Faith Estimate; Addendum to Good Faith Estimate; Mortgage Servicing Transfer Disclosure; Truth-in-Lending; and Notice of Right to Cancel. Loan Officer's and/or Mortgage Brokers must obtain all proper licensing within the States where they plan to work. Separate licenses are required for agents to sell certain Mortgage products. TSL is an independent marketing firm and is not contracted with any bank or financial institution TSL does not require the Loan Officer and/or Mortgage Broker to provide their license (s) information to purchase pre-set appointments. Loan Officer and/or Mortgage Broker are responsible to obtain prior permission/approval (if required) from their banking financial institution and/or carrier/agency (s). TSL is not responsible nor will refund any amount of services rendered if the Loan Officer and/or Mortgage Broker does not follow their banking financial institution and/or carrier/agency guidelines and requirements.

**DOUBLE CHECK YOUR ORDER**

Sometimes faxed orders are not clear. It is imperative to double check your schedule attached prior to making a payment. Please verify if the following is correct:

1. Type of Appointments
2. Schedule
3. Territory (city or county)
4. Special Request
5. Contact information (including your email address)

If there are any errors, please send an email immediately to the Order Processing Manager. Once we have verified your desired schedule for the week and you have made a payment you cannot change or stop your confirmed order schedule until it's fulfilled or until your reorder is placed. TSL must receive payment for any purchased Leads prior to the distribution of the same to the Buyer. Payment shall be in a form acceptable to TSL; the existing forms of payment that are acceptable are: check, money order, carrier check or cashier's check. All forms of payments must be received no later than Wednesday to start orders for the following week. Personal check payments may delay processing for 5-7 days.

**Arbitration Clause:** Any dispute between TSL and the Buyer, claim or controversy arising out of or relating to this Agreement or the breach, termination, enforcement, interpretation or validity thereof, including the determination of the scope or applicability of this agreement to arbitrate, shall be determined by arbitration to take place in Collin County, Texas. The parties agree that the dispute shall be submitted to binding arbitration under the rules issued by the American Arbitration Association. The decision of the arbitrator shall be final. Allocation of Fees and Costs: A Judgment on the Award may be entered in any court having jurisdiction. If an "Award" is awarded to either party the Arbitrator may allocate all of the costs of the arbitration, including the fees of the arbitrator and the reasonable attorneys' fees of the prevailing party. Arbitration conducted hereunder shall take place in Collin County, Texas.

**THIS CONTRACT CONTAINS A BINDING ARBITRATION PROVISION WHICH MAY BE ENFORCED BY LEGAL ACTION.**

**Telemarketing Sales Leads™** offers services that are subject to the terms and conditions set forth herein requiring full compliance on the part of the Agent. If you are in non-agreement to any terms and conditions disclosed in this agreement, discontinue using this site for info or placing an order. By your acceptance of proceeding with placing an order and usage of this service for any purpose including order purchases is regarded as your agreement to the terms and conditions stated above and are legally binding between us.

**By signing below, you are acknowledging you have read and you are in agreement to **Telemarketing Sales Leads™** Terms and Conditions.**

**Agent Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Please Print Agents Full Name:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**City:** \_\_\_\_\_ **State:** \_\_\_\_\_ **Zip:** \_\_\_\_\_

**Home #:** \_\_\_\_\_ **Cell #:** \_\_\_\_\_