



My Home Pro Network



Homeowner Help

Hi [First Name],

This is [YOUR NAME] from [YOUR OFFICE]. I'm calling to see whether I can help out with your taxes, specifically as it relates to homeownership. Will you be filing on your own, or will you hire an accountant?

IF FILING INDEPENDENTLY:

I'm impressed! Well, I do want to make sure that you're aware that you can deduct your mortgage interest and any real estate tax paid. And if you decide to hire an accountant, let me know. I'm happy to make a recommendation.

IF HIRING AN ACCOUNTANT:

Great! Have you already chosen who you'll work with?

IF NO:

Ah. I've got a great network of local pros I work with. I'd be happy to send over a list of accountants I recommend to my clients. Give them a call, and be sure to mention that I sent you!

IF YES:

Mind if I ask who? I'd be excited to connect see whether I might recommend them to my other clients.

Even if your contacts aren't homeowners, they could use a good tax reminder. Make sure they know that homeownership creates numerous tax breaks. Use this script to turn renters into buyers!

Renter's Reminder

Hi [FIRST NAME],

I'm calling to see if I can help you out with your taxes. Have you been able to find a good local accountant or will you be filing independently?

IF FILING INDEPENDENTLY:

That's great! If you decide to hire an accountant, let me know. I'm happy to make a recommendation. And while I have you, did you know that homeownership can save you hundreds if not thousands of dollars a year on your taxes?

IF HIRING AN ACCOUNTANT

Great! Have you already chosen who you'll work with?

IF NO:

Well, I've got a great network of local pros I work with. I'd be happy to send over a list of accountants I recommend to my clients. Give them a call, and be sure to mention that I sent you!

IF YES:

Mind if I ask who? I'd be excited to connect and see whether I might recommend them to my other clients. And be sure to ask them about the tax advantages of homeownership—it can save you hundreds if not thousands of dollars every year. Have you considered buying a home this year?