

Plenti

Plenti's **guide** to...

Debt consolidation

Overview & Segmentation

What are we providing?

- Some text that you may want to copy and paste into an email to send out to your customers who might be interested in consolidating their debt

Which customers could be appropriate to target?

When considering who to target, you may want to think about:

- Customers who have expressed interest in a home loan and are currently on budgeting or savings plans
- Customers who completed a recent home loan, car loan or business loan with you and applied with a high level of existing unsecured credit cards or personal loans
- Customers who you previously wrote a loan for >2 years ago who could potentially obtain a lower rate

Plenti's lockdown guide



Marketing Support

Plenti

How do I send this to multiple clients at once?

- Copy and paste your clients' email addresses into the BCC field of your email, that way your clients won't be able to see who else you have sent the email to.
- Always write your own email address in the "to:" field

Can I add my own branding?

- You can create a simple branded header in PowerPoint or Google Slides.
 1. Create a rectangle approximately 3 – 4 cm high
 2. Fill it with your desired colour
 3. Copy and paste your logo onto the slide and resize to be about 1/6th of the width of the rectangle
 4. Drag and drop the logo onto your chosen place within the rectangle (we suggest left, middle or right hand side)
 5. Take a screenshot of your rectangle
 6. Copy and paste it into your blank email
 7. Resize and centre align



New home loan customers who are currently on budgeting or savings plans

Good Morning/Afternoon

I'm checking in to see how you are progressing with your budgeting and savings plan so we can get you into your home sooner.

If you have any outstanding unsecured loans, including credit cards, I could help by consolidating those loans into one simple repayment.

I would love to do some research for you and see if I can find you a more competitive interest rate.

How will this benefit you?

Not only could I potentially find you a lower interest rate, you may also be eligible for a longer loan term with reduced monthly payments to free up more cash flow. Lower interest rates and smaller monthly repayments could accelerate your savings plan and increase your borrowing power for your new mortgage.

What do you need to do?

Give me a call or shoot me an email. I'll review your existing interest rates and loan terms, do some research and find the best provider for you. Depending on the provider, we could have your debts consolidated within one day, without you having to leave the couch!

I look forward to helping you tidy up unwanted debts and help you secure your home sooner.

Kind Regards,
[Broker Name]

Customers who completed a recent car loan, home loan or business loan with you and applied with a high level of existing unsecured credit cards or personal loans

Good Morning/Afternoon

I know that you recently took out a loan with us so I thought it would be great to check in and see if we could help you by consolidating your debt on any other outstanding loans or credit cards.

I would love to do some research for you and see if I can find you a more competitive interest rate.

How will this benefit you?

Simple: lower interest rates = more money in the bank for you! Not only could I potentially find you a lower interest rate, you may also be eligible for a longer loan term with reduced monthly payments.

What do you need to do?

Give me a call or shoot me an email. I'll review your existing interest rates and loan terms, do some research and find the best provider for you. Depending on the provider, we could have your debts consolidated within one day, without you having to leave the couch!

I look forward to helping you lower your interest rate so that you can have more money to boost your savings, pay off your loan faster, or do just about anything you like.

Kind Regards,
[Broker Name]

Customers who you previously wrote a loan for >2 years ago who could potentially obtain a lower rate

Good Morning/Afternoon

I helped you take a loan out a few years ago and now that your loan term is maturing, I thought it would be great to check in and see if we could help you by consolidating your debt on any other outstanding loans. I would love to do some research for you and see if I can find you a more competitive interest rate.

How will this benefit you?

Simple: lower interest rates = more money in the bank for you! Not only could I potentially find you a lower interest rate (personal loans can now start as low as 6%, you may also be eligible for a longer loan term with reduced monthly payments. To top it all off, you'll have full financial flexibility to pay off the loan at any time with no early exit fees.

What do you need to do?

Give me a call or shoot me an email. From there, I'll review your existing interest rates and loan terms, do some research and find the best provider for you. Depending on the provider, we could have your debts consolidated within one day, without you having to leave the couch!

I look forward to helping you lower your interest rate so that you can have more money to boost your savings, pay off your loan faster, or do just about anything you like.

Kind Regards,
[Broker Name]