



## **Collector Check List**

Collectors Name \_\_\_\_\_ Date \_\_\_\_\_

Debtors Name \_\_\_\_\_

Identify the person

- Only talk to the debtor or the debtors spouse
- If you must leave a message
  - Name and Phone ONLY
  - Other information only if asked

Update Information in your system

- Address
- Phone Number
- Get permission to use automated dialer to leave messages
- Employment

Make sure you have all the accounts

(Some systems allow multiple and separate accounts, get them ALL, including those from relatives that may be collected from on this call)

Ask for Payment In Full (PIF) - NOW!

Get Check number, amount and date it will be mailed - NOW

Get Credit/Debit Card NOW

Don't let a promise go bad by not getting the \$ - NOW

Arrangements if PIF Not possible – Good Faith Payment - NOW

Get Check number, amount and date it will be mailed - NOW

Credit/Debit card

Signed Agreement / with worksheet

Postdated checks

Close call

Verify all payment information

Thank the debtor

**CBF Services**

509 East 20<sup>th</sup> Street, Farmington, New Mexico 87401

www.cbfservices.com

888-325-5055

Enter notes  
Put the arrangements in your system  
Follow-up on the agreed upon day

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