



## The Loan Officer's Real Estate Marketing Toolkit

Want to develop a sustainable history of long-term referral relationships with members of the real estate community? You must add value to this community. In our premier training program, *Inside The Glass House*, we define value as having two components:

1. Uniqueness – not what every other loan officer is offering.
2. Relevancy – what real estate agents are interested in.

What are agents interested in? More transactions with less stress. They sell real estate, not mortgages. Mortgages are relevant, but they are not the focus of agents or their clients.

Here we bring the epitome of support materials enabling you to bring measurable value to the agents you serve on a regular basis. From presentations to educational materials, you will find a variety of tools you can use.

*And we will be adding more valuable pieces to the system on a regular basis!*

### Presentations

#### Weekly Sales Meeting Slides

Delivering sales meetings in real estate offices? Whether you are presenting sporadically or on a regular basis, we provide a complete presentation each week so that your presentation is professional and valuable.

*December 23, 2024-Sales Meeting Presentation-  
December 16, 2024-Sales Meeting Presentation-  
December 9, 2024-Sales Meeting Presentation-  
December 2, 2024-Sales Meeting Presentation-  
November 25, 2024-Sales Meeting Presentation  
November 18, 2024-Sales Meeting Presentation  
November 11, 2024-Sales Meeting Presentation  
November 4, 2024-Sales Meeting Presentation  
October 28, 2024- Sales Meeting Presentation  
October 21, 2024- Sales Meeting Presentation  
October 14, 2024- Sales Meeting Presentation  
October 7, 2024- Sales Meeting Presentation  
September 30, 2024 Sales Meeting Slides*

#### Lunch and Learns

Complete topics which you can deliver as a whole or carve up and present in parts:

*The Reverse Mortgage Solution  
Qualify More Prospects Using Advanced Credit Tools  
Understanding Rates and the Secondary Markets  
Unique Borrowers and Challenging Situations  
Using Assumptions in a Higher Rate Market  
VA Lending Presentation  
First Time Homebuyer Financing Options*

*Sell More Homes Using Buydowns*  
*The Financial Benefits of Purchasing a Home*  
*All About Appraisals -- July 2024*  
*FHA Lending Presentation -- August 2024*  
*All About Mortgage Insurance -- November 2024*

### **Consumer Presentations**

Whether targeting buyers or sellers (or both)—we give you plenty of material to utilize for public seminars:

*First Time Homebuyer Seminar*  
*How to Purchase a Home Using Someone Else's Money*  
*Sell Your Home Successfully in Any Market*  
*Buying and Financing An Investor Property - September 2024*

### **Continuing Education**

Want the maximum attendance at your presentations – even top producers? Offer continuing education credit:

*Home Financing 101*

## **Sales Support**

### **Realtor Sales Presentations**

Adding maximum value entails showing agents how to fish, as opposed to feeding them each day. Take note of the Potential Real Estate Partnership for those who are vying for a seat/partnership in a real estate office/company.

*Maximum Sphere Marketing*  
*Potential Real Estate Partnership*  
*Converting More Leads - July 2024*

### **Sales Articles**

You can give maximum value on a regular basis by forwarding personalized sales materials. You can even turn these into lunch and learns or put together an office mastermind group to review on a weekly/monthly basis. This makes you a mentor/leader, rather than a salesperson. Note that many more articles are included with the OriginationPro Marketing System. These articles can be personalized and emailed from the system and can be posted on your website.

*Are You an Employee or the CEO of Your Company*  
*Rx For an Attitudinal Checkup*  
*Be More Effective Over The Phone*  
*Don't Give Up on That Prospect*  
*Negotiation Skills For Winners*  
*Pick Up The Phone and Call*  
*The Real Secret to Success*  
*The Truth About Niches*  
*Time Management – Getting More Accomplished*  
*Working With First Time Buyers*  
*Your Sales Training is Wrong*  
*Testimonials*  
*The Essential Call For More Referrals*  
*The Mirror – The Number One Sales Tool*  
*The Most Important Close*  
*The Basic Laws of Marketing*  
*A Key To More Referrals- August 2024*

## Social Media Pieces

Social media is an important part of today's marketing equation. Some of these are geared to the agents themselves and others are pieces you can provide to the agents to post.

*Realtor Unique Proposition*  
*The Home Price Picture*  
*Second Look Offer Flyer*  
*Purchase Options With Reverse Purchase Program*  
*Buydowns For Your Dream Home*  
*Thinking About Selling*  
*Thinking About Purchasing Your First Home*  
*Thinking About Purchasing Your First Home*  
*Unique Borrowers – Non QM*  
*VA Home Loan Flyer*  
*Rates Are Down*  
*The Family Affair*  
*The Rate Protector*  
*A Bullet Proof Pre-Approval*  
*The Real Truth 400K*  
*The Real Truth 300K*  
*Introducing Our Effortless Heloc*  
*FHA Home Loan Flyer - July 2024*  
*Time To Refinance – August 2024*  
*Time For Clients To Refinance – August 2024*  
*Delayed Financing – October 2024*  
*New 2025 Loan Limits - November 2024*

## Educational Material

### Consumer Articles

Articles that your agents can provide to prospects on a wide variety of topics. They can also be left at open houses or distributed at other events. They make great topics for sales meetings as well. You can personalize them manually with your information. Note that many more articles are included with the OriginationPro Marketing System. These articles can be automatically personalized and emailed from the system and can also be posted on your website.

*Your Home Can Fund Retirement*  
*Why Purchase an Investor Property*  
*Time to Refinance – Here Are The Reasons*  
*Vacation Homes – The Real Estate Trend of the Decade*  
*The Reverse Mortgage Solution*  
*Temporary Buydowns Can Help Sell a Home*  
*Tax Deductions For Homeowners*  
*Profit From Using a Second Mortgage*  
*Purchasing Commercial Property*  
*Saving Money on Your Homeowners Insurance*  
*Should I Buy This House*  
*Biggest Mistakes Homebuyers Make*  
*Getting Married? Time to Pop The Second Question*  
*Homeownership – More Than Money*  
*Obtaining The Best Appraisal in Any Market*  
*Parents – Do You Want to Help Your Children?*  
*The Federal Reserve*  
*Better Closing Experience - 8/24*  
*Get Your Cash Back - 10-24*  
*Treating Property in a Divorce - 10-24*  
*Understanding Homeowners Associations- 11-24*  
*Financial Contingencies for The New Year 12-24*

## Newsletters

The newsletters you distribute should be focused upon what your targets are interested in, which is primarily real estate accompanied by mortgage information. Not the other way around. And they should not come from a CRM that is used by tens of thousands of loan officers which means your agents will get multiple copies. Our Real Estate Reports are provided in several formats (email, print, mailing). The email version can be personalized in the OriginationPro Marketing System.

*Weekly Real Estate Report (email version)*  
*Monthly Real Estate Trends (one page print)*  
*Monthly Real Estate Update (four-page self-mailer).*

### **Weekly Real Estate Update and Trends**

*December 10, 2024 Real Estate Report*  
*December 10, 2024 Real Estate Trends*

*December 17, 2024 Real Estate Report*  
*December 17, 2024 Real Estate Trends*

*December 24, 2024 Real Estate Report*  
*December 24, 2024 Real Estate Trends*

### **Monthly Real Estate Update and Trends**

*Real Estate Update October 2024*  
*Real Estate Trends October 2024*

*Real Estate Update November 2024*  
*Real Estate Trends November 2024*

*Real Estate Update-December 2024*  
*Real Estate Trends-December 2024*

*Real Estate Update January 2025*  
*Real Estate Trends January 2025*

## Miscellaneous Educational Materials

We provide a wide range of materials within this category. These pieces are great to demonstrate to your agents that you are **THE** expert within the industry. Some of these can be used at first time homebuyer seminars or lead to additional presentations or even continuing education courses.

*First Time Home Buyers Objectives Form*  
*2025 Loan Limits Flyer – November 2024*  
*2025 Program Comparison Chart – November 2024*  
*Application Checklist – Purchase*  
*Application Checklist – Refinance*  
*Book of Home Finance 2021 Edition*  
*Credit Events Table*  
*Customer Service Survey*  
*First Time Homebuyer Financial Planner*  
*FAQ About The Homebuying Process*  
*Loan Officer Business Plan*  
*Questions to Ask Rate Shoppers*