



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.

Sales Meeting Presentation-August 4, 2025
Sales Meeting Presentation-August 11, 2025
Sales Meeting Presentation-August 18, 2025
Sales Meeting Presentation-August 25, 2025
Sales Meeting Presentation-September 1, 2025
Sales Meeting Presentation-September 8, 2025
Sales Meeting Presentation-September 15, 2025
Sales Meeting Presentation-September 22, 2025
Sales Meeting Presentation-September 29, 2025

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 -- January 2025 Updated
FHA Lending Presentation -- August 2024

All About Mortgage Insurance — November 2024
Home Ready Home Possible — March 2025

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 – January 2025 Updated

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
Improvement — Key to Success - January 2025
Assistant — March 2025

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
Cash Out Refinance - January 2025
Home Possible – Home Ready- March 2025
Real Estate Investment Financing- March 2025
Dreaming Of Owning – April 2025
Refinance Reasons – September 2025

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 **Updated 7/25***
*Time to Refinance – Here Are The Reasons **Updated 6/25***
*Vacation Homes – The Real Estate Trend of the Decade **Updated 6/25***
The Reverse Mortgage Solution
*Temporary Buydowns Can Help Sell a Home **Updated 7/25***
*Profit From Using a Second Mortgage **Updated 7/25***
Purchasing Commercial Property
*Saving Money on Your Homeowners Insurance- **Updated 5/25***
*Should I Buy This House -**Updated 5/25***
Biggest Mistakes Homebuyers Make
*Getting Married? Time to Pop The Second Question- **Updated 7/25***
*Obtaining The Best Appraisal in Any Market -**Updated 6/25***
*Parents – Do You Want to Help Your Children? **Updated 6/25***
The Federal Reserve
*Better Closing Experience – **Updated 7/25***
*Treating Property in a Divorce – **Updated 6/24***
*Understanding Homeowners Associations- **Updated 9/25***
Financial Contingencies for The New Year 12-24
*Homeownership — More Than Money — 2-25 **Updated***
*Tax Deductions for Homeowners– 2-25 **Updated***

*Get Your Cash Back – 5-5 **Updated***

*Why Do I Have to Pay Mortgage Insurance – **Updated 6/25***

Special Occasion/Holiday Greetings

Mother's Day

Father's Day

Fourth of July

Happy Easter

Happy Halloween

Labor Day

Fourth of July

Happy St. Patrick's Day

Memorial Day

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).

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