

**THE SECRET LOAN OFFICER FORMULA THAT PRODUCES MAXIMUM MONEY IN MINIMUM TIME... CONSISTENTLY...  
REGARDLESS OF MARKET CONDITIONS, RATES OR THE ECONOMY**



Dear Loan Officer Formula Coaching Member,

Please take a few minutes right now and take this personal success assessment. Answer the questions honestly. Now review the areas you have rated as #1 and you will be able to see the areas you need the most help in. Spend some time in those modules and start using the tools they offer so you can start seeing improvements quickly!

All of the loan officer modules are inter-connected and will provide you with a formulaic way to gain maximum commissions in minimum time regardless of market or economic conditions.

I will be constantly updating them so make sure you check back often, and leave your comments and questions. Each module also gives you the opportunity to rate it so others can see how much value it provides.

Dedicated to increasing your commissions,

A handwritten signature in black ink, appearing to read 'Brian Sacks', is written over a white background.

Brian Sacks

**P.S. STOP WHAT YOU ARE DOING NOW AND JUMP IN!** Every success and journey starts with the important first step! So take the survey, review the results, and get started with the module you need the most help with before moving on!

Know that I will be right there to help you every step of the way.

# My Personal Success Assessment

Need Help!

Could Be Better

Under Control

1

2

3

## Time Management

I know what to do but can't seem to find the time to get it done.

I am too busy working in my business to do any marketing.

I am constantly distracted during the day with problems that should be taken care of.

I am working "IN" my business not on it.

I don't know how to overcome my unproductive behavior.

## Technical Knowledge

Need Help!

1

Could Be Better

2

Under Control

3

I do not have a full grasp on the whole mortgage process.

I want to know everything I can about the largest niche to ever hit our marketing and closing industry (reverse mortgages)

I was never properly trained and tend to make costly mistakes

I not confident when I speak to clients because of my poor training in the “basics” of mortgages lending.

## Persuasion

Need Help!

1

Could Be Better

2

Under Control

3

- I get a lot of calls but I cannot seem to convert these prospects into clients.
- I have no control over my clients, prospects and referral sources. They run me.
- I don't feel I am well respected by my clients, prospects referral sources.
- I don't know what motivates buyers to choose me.
- I am unable to get whatever I want or need and always feel I am at someone's mercy.
- I am unsure why someone chooses me.
- I have too many prospects and clients who start with me but leave to go to another lender.
- I spend a lot of time with buyers and prospects only to have them elsewhere.
- I am tired competing just on price.

## Marketing

Need Help!

Could Be Better

Under Control

1

2

3

- I can't seem to generate enough leads. I don't have a systematic way to generate new business.
- I have a small budget and can't seem to find creative ways to generate new business.
- I've tried direct mail and failed. Others have told me it works, I just don't know how.
- I can't seem to crack the Realtor market and find ways to have them give me business.
- Sometimes I feel like a "one night stand" loan officer not knowing where my next deal is going to come from.
- I would like to use publicity and other creative strategies to be seen as the obvious expert in the area, (the "go to" person) but don't know how!
- I would like to have other professionals sold on using me but don't know how!
- I know I should be getting referrals from past clients but don't know how!
- I don't have a marketing system that is able to generate new business consistently regardless of the market and economy.
- I have no idea if my marketing is working or not. What I need is a way to make every penny I invest in marketing be **TRACKABLE** and **ACCOUNTABLE**.
- I was told to "get my name" out there and have spent money doing that but am still not closing enough deals.

## System and Staff

Need Help!

1

Could Be Better

2

Under Control

3

I am too involved in many other loans to continue marketing for new loans.

I feel I am always at the mercy of my processor and staff.

I know there are multiple ways to generate more instant business from each deal I get but I am not sure how or what to do.

My processor and staff seem to be my biggest obstacle instead of the group who should be helping me make more money.

I do not have a systematic way to get my loans processed/ underwritten/ and closed quickly and efficiently.

I am tired of being screamed at for missing deadlines.

My pipeline runs me and I have no idea how to efficiently manage it and it keeps costing me money each month.

## The Mindset

Need Help!

1

Could Be Better

2

Under Control

3

I am frustrated and in a bad mood.

I know successful originators and company owners have a different mindset but I don't know how to get this same mindset.

I would like to know the specific steps to achieving more in my next 12 months than I have in the past.

How can I get a "successful mindset" when I am not really successful yet.

I keep thinking the "grass is greener" which leads me on a path where I lose focus and money.

I make excuses for the level I'm at but know other who are doing well in the same situation I'm in.

## Salesmanship

Need Help!

Could Be Better

Under Control

1

2

3

I am tired of working twice as hard but making half as much.

I am tired of wasting time with the buyers I can't help.

I am tired of being seen as a “head of lettuce” and always competing just on my rates and fees.

I would like to be able to create irresistible ads and marketing prices.

I've heard that there are certain people that are visual/kinesthetic and auditory but don't know how to use that information to my advantage when meeting with prospects on referral sources.

I don't know what my prospects “buying cues” and body language is telling me so I am unable to “control” the sales process.

I would like to generate more business online!

My dream would be to have buyers sold on using me before they even meet me so I don't have to keep answering calls on evenings and weekends.

Once you have completed the survey, go back and review your answers and pay special attention to the areas you have rated as #1. These mark the areas you need the most help in. The more #1's you have scored in a single section will tell you how to prioritize which modules need your immediate attention. Spend time in each module and start using the tools they offer so you can start seeing improvements quickly!

Again, all of the loan officer modules are inter-connected and will provide you with a formulaic way to gain maximum commissions in minimum time regardless of market or economic conditions.

The modules will be constantly updated so make sure you check back often, and leave your comments and questions. Each module also gives you the opportunity to rate it so others can see how much value it provides.

Remember, every success and journey starts with the important first step!