

X THE COMPLETE LOAN APPLICATION

Setting the stage for success through a focus on application quality, customer service and creating raving fans



What will you gain?

The COMPLETE LOAN APPLICATION empowers loan officers to take control of a crucial success factor – quality loan applications.

While a loan officer's primary goal is to generate business, they also have a responsibility to clients, referral sources and their operations team to provide excellent customer service and submit complete files. Anything less than a flawless application slows everyone down – and can also hurt relationships with Key Targets®, additional referral opportunities, and overall production.

THE COMPLETE LOAN APPLICATION enables loan officers to:

- Measurably increase quality applications
- Enrich their working relationships with operations teams
- Improve the customer preparation process before and after application
- Experience faster turn times and gain more time to prospect
- Implement 6 fundamental steps to delivering an application that drives repeat business and new referrals



What's included?

The Complete Loan Application is a 90-minute live webinar that walks through all that's involved in completing the highest quality loan application. This ensures a successful partnership between Operations and Sales, while providing the optimum customer experience and maximum opportunity for client referrals. This powerful, interactive session includes a handout that students follow and complete during the training – ensuring engagement, comprehension, and retention.

In addition to the comprehensive training, attendees receive valuable **post-class business tools at no additional cost** including:

- "Items Needed" email templates and phone scripts
- Loan application screening checklist
- Credit report checklist
- Income/employment screening checklist
- Income calculation practice examples
- ... and more.



Intended Audience

- Experienced loan officers
- Processors
- New loan officers

How does it work?

- One, 90-minute, live instructor-led webinar with handout
- Variety of valuable post-class business tools
- Classes available for private events



The Complete Loan Application ensures your applications are timely, complete and correct the first time, every time.

