



mortgage success source

Success through Sales and Marketing Excellence

control database marketing mitigate risk  
timely websites brand management  
pipeline FSBO videos best practices  
writers compliance archiving personalization periodical  
automated marketing consumer marketing  
effective realtors retention social media reduce costs  
training content premium content designers  
industry experts reporting risk mitigation professional  
multi-media leads fresh content high quality content  
market news referral partner marketing  
relevant content refinance credit marketing  
disclosure lockdown campaign set-up

## Today's Challenge

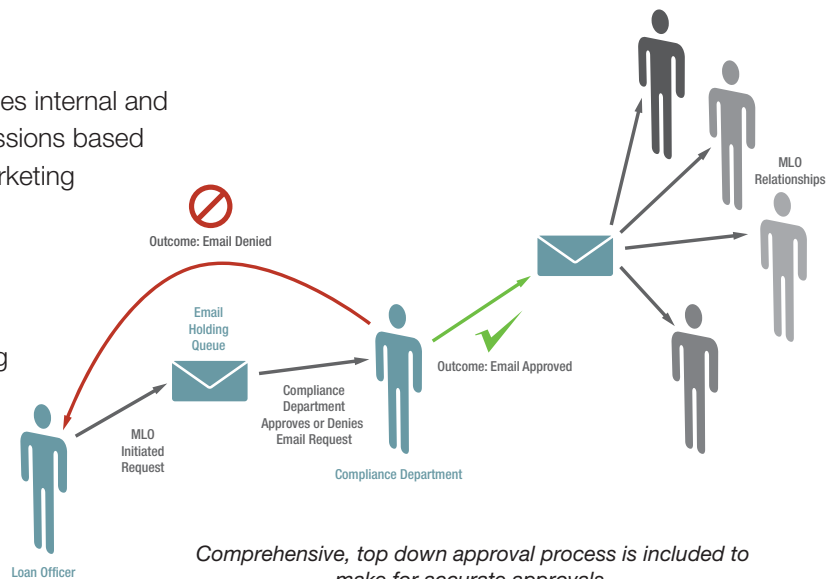
The stakes are higher than ever for lending institutions of every size to meet the three-part challenge of strengthening customer and referral relationships, attracting and growing the best loan originators and ensuring regulatory compliance.

To realize increased profitability, it is critical to deploy compelling marketing content that has the controls needed to ensure regulatory compliance and to meet brand and messaging guidelines.

## Total Control to Protect

With our authorization platform, management satisfies internal and external requirements by granting or denying permissions based on the role of the individual user and the type of marketing content being deployed.

You gain the confidence of knowing that the proper checks and balances are in place to ensure every piece of marketing content is approved before being released to consumers or industry partners. Plus, Mortgage Success Source includes automated archiving built into the service to guarantee compliance measures are met on all fronts.



## Professional Excellence to Empower

Ensuring loan originators reach their maximum potential is not easy. Raise the level of your entire origination team to reach their peak performance with:

- ▶ **Professional Development & Best Practices:** Improve your results using expert industry knowledge, persuasive sales scripts, successful strategies to gain and keep referral partners, and enhanced training materials to convert more prospects and close more loans.
- ▶ **Market News & Analysis:** Arm your team with daily market guidance, real-time MBS bond quotes, expert analysis of market events, in-depth market news and daily market assessments to stand out from your competitors.

## Content to Deliver Results

It takes much more than the usual holiday and anniversary cards or other stock content to build loyalty and grow your business in today's highly competitive and regulated environment. It takes premium marketing content.

For more than a decade, successful organizations have relied upon Mortgage Success Source to deliver the lending industry's highest-value premium content including: multi-media e-magazines, professionally-written newsletters and compelling videos to keep marketing expenditures on-budget, outbound communications fresh and shift profitability back into high gear.

## Premium Content to Increase Sales

The need for powerful, personalized content to increase sales never ends. But the time and expense that comes with dedicating an entire team of professional marketers, writers and designers to create ongoing marketing content is costly to maintain.

For marketing to be done intelligently, it must be economical, compliant and targeted to reach your audience. Timely, relevant and effective, you can depend on high-quality marketing content from Mortgage Success Source to reach and convert more consumers and referral partners such as real estate agents, CPAs, tax attorneys and other industry partners.

Our marketing content is easily combined with content you develop and can be readily launched through our secured, automated web-based system or through your own deployment system.

### Consumer Marketing

*Reach prospective and past clients at the right time throughout the year with the most effective content available.*

- ▶ **YOU Magazine** – Monthly e-magazine devoted to essential consumer topics
- ▶ **Homes & Money Newsletter** – Quarterly e-newsletter focused on homeownership
- ▶ **Practical Financial Tips** – Quarterly communication covering consumer matters
- ▶ **Views You Can Use** – Monthly e-publication on relevant financial issues
- ▶ **Consumer Quick Tips** – Periodic success tips created exclusively for consumers

### Referral Partner Marketing

*Target industry partners with exclusive referral partner marketing content.*

- ▶ **Co-branded Marketing** – Expand your reach by co-branding consumer marketing pieces with referral partners to target their databases
- ▶ **MMG Weekly** – High-quality e-newsletter offering mortgage insights for professionals
- ▶ **Business Boosters** – Tactics to help referral partners improve their businesses

## Presentations to Boost Conversion Rates

Boost conversion rates, reduce pipeline fallout and lower lead acquisition costs with the most professional and compliant online presentation system in the industry.

This powerful and visually appealing presentation system meets compliance regulations. Every proposal offers customers the lowest rate, the lowest points and the lowest risk options and archives a record for your files.

Plus with live desktop sharing, a mobile app and more, your origination teams can easily match any borrowing or repayment scenario anywhere and at anytime the borrower needs.



## The Solution

Mortgage Success Source serves the nation's premier lending institutions, both large and small, providing outstanding solutions that positively impact the bottom line.

Our time-tested solutions are easily incorporated into any business model to increase productivity and ultimate profitability.

- ▶ Drive mortgage sales using best-in-class marketing content proven to convert more customers and referral partners.
- ▶ Control messaging, satisfy brand guidelines and ensure regulatory compliance of marketing communications to mitigate risk.
- ▶ Increase production levels with access to the industry's best practices, sales strategies, market news and analysis to increase ROI of your loan production platform.

Now is not the time to sit back and hope loan professionals are being as productive as they can be without the solutions from Mortgage Success Source. There's simply too much at risk. A lot has been invested in your mortgage origination channel... now make that investment pay the highest dividends possible.

Success has many dimensions. In today's environment, it's not enough to just sell. You need to maximize relationships, attract and retain the best loan originators and ensure regulatory compliance guidelines are met each and every time. Mortgage Success Source helps mortgage organizations seize opportunities for success in any financial climate and win.

Generate valuable leads, strengthen relationships and develop lasting referral partnerships with Mortgage Success Source. Call (800) 963-1900 or visit our website at: [MortgageSuccessSource.com](http://MortgageSuccessSource.com).

*"Mortgage Success Source keeps our team in touch with past clients, referral partners and new prospects in a best of class marketing framework. It's one of the best investments we've made to drive our business forward."*

*~ **A. W. Pickel III**, President/CEO, LeaderOne Financial Corporation*

*"I highly recommend Mortgage Success Source for anyone who is a professional in the mortgage industry. The marketing content works great and is always pertinent."*

*~ **Gary Nielson**, Vice President, Republic Mortgage*

*"Mortgage Success Source is a huge asset to the business and a great part of our continued connection to current and past relationships. The ability to communicate a timely and appropriate message in just seconds is key to our success."*

*~ **Derek Egeberg**, Branch Manager, Academy Mortgage*