



Approaching Loan Officers – Bullet Points

Initial LO Call:

- I am generating leads for real estate agents - to establish a relationship with them and gain their referrals.
- I need to partner with a loan officer in hopes to drive their referrals through a loan officer "partner" so that you get more loans, which in return, will funnel to your home insurance "partner"...**ME!**
- I need a great loan officer "partnership" to grow with.
- I am not asking you to pay for anything! I'm offering complimentary to you as my referral partner. You will have access on my platform to refer hundreds of real estate agents to register as well, you don't pay a dime, they won't pay a dime!

(Send them a webinar link invitation with the LO presentation from the MAC tutorials, ask them to watch before meeting. It will peak their interest even more and you don't have to explain everything, just show them your platform.)

LO Follow Up Meeting:

- Discuss my company.
- Discuss my service. (fast, thorough, added value to the client making you look great!)
- Discuss our home policy, as good or better than any other company.
- Demo the five lead-gen features from your MAC dashboard:
 1. **Single property website**
 2. **Digital business card (RA's Love this)**
 3. **Open house app**
 4. **Text codes**
 5. **Social media posting tool**

"How do you like this tool and wouldn't it be great to give this to RA's, to say thanks, RA's your already working with, AND to go out and build new relationships."

"Ask them what their expectations in referring home insurance to you are?"

"Don't forget to ask your "partner" to give you their business."

"Make it easy to do business with you when they refer home insurance referrals."

(Very basic info you need for home insurance quote) (Simply forward me appraisal/loan app)

NOTES: