

2014 Power Planning For Mortgage Professionals

1) Review last year's accomplishments

- a. My gross fees in 2013 were: \$_____ /12= \$_____/mo
- b. My total loan volume was: \$_____ /12= \$_____/mo
- c. My total number of closed transactions was _____
- d. I recruited _____ people (if applicable)
- e. My average fees per loan were: \$_____
- f. My average loan size was: \$_____
- g. I attended/member of _____ networking/support groups
- h. I learned _____ new specialties / got _____ new certifications
- i. I have _____ realtors/referral sources that I regularly get business from
- j. I held _____ special events (seminars, expos, open houses)
- k. Other _____

2) Now turn these into goals for 2014

- a. My gross fees will be: \$_____ /12 = _____ per month
- b. My total loan volume will be : \$_____ /12= _____/mo
- c. My total number of closed transactions will be _____
- d. I will recruit _____ people
- e. My average fees per loan will be: _____
- f. My average loan size will be: _____
- g. I will get on the board of _____ networking group
- h. I will learn _____ new specialties/ get _____ new certifications
- i. I will add _____ steady realtors/referral sources sending me business
- j. I will put on _____ special events (seminars, expos, open houses)
- k. Other _____

3) The top 5 things I will implement in 2014 to accomplish my goals:

- a. _____
- b. _____
- c. _____
- d. _____
- e. _____