 

**Realtor® & Loan Originator List Of Partnership Activities**

1. **Leveraging Listing Support**
	1. Call/Contact with prospective Seller offering team support and client support during the listing process
2. **Annual Mortgage Fitness Review & Identity Theft Screening**
	1. Lender and Realtor can use this strategy to re-activate past client contact
	2. Realtor can opt to use this strategy with farm promotion
3. **Premium Open House Partnerships**
	1. Lender and Realtor can leverage the “contact” options for an upcoming open house to include:
		1. Feather Flags branded to both companies and professionals
		2. Presence at Open House to offer Pre-Approval vs. Pre-Qualification to prospective buyers
		3. Lender can help agent perform the 10/10/20 for the “Sneak Peek” Exclusive neighborhood Open House invitation event prior to the public open house
		4. Lender can share the costs of the invitation to the Sneak Peak and the flyer promotion in the local area to promote Open House attendance
		5. Lender can share in the thank you follow up after the event to advance connection with new prospects met at the Open House
		6. Lender can offer reports on various issues: Credit Repair, Military Financing, Down Payment Scenarios at Open House
4. **Prospecting Strategies for New Inventory- Forever, Open Houses**
	1. Lender and Agent share costs and development of the Forever Home Direct mail strategy to profile trade up/down possibilities to local farm area for Agent

1. **New listing or newly closed Prospecting Strategies 10/10/20**
	1. Lender and Agent conduct 10/10/20 activities around a newly listed or freshly closed transaction to provide referrals for new buyers and possible sellers in a neighborhood
	2. Lender/Agent can offer to conduct a Housewarming Party around a newly closed listing (\* See events)
2. **Marketing & Branding thru Farming**
	1. Realtor to compile monthly or bi-monthly neighborhood update flyer listing new listings, new closed transactions with call to action for Market Report, Home Valuation Report and leverage the lender’s services for an Annual Mortgage Fitness & ID Theft Screening - Equal branding – equal billing
3. **Leveraging Prospecting Platforms**
	1. Lender and Realtor can leverage prospecting tools:
		1. Interactive Voice Response Systems ([www.SmartGuy800.com](http://www.SmartGuy800.com))
		2. The RedX.com for FSBO, Expired, For Rent by Owner
4. **Lunch & Learns- Educational Events**
	1. Lender and Agent to co-sponsor local educational events for various specificities in real estate like Credit Repair, First Time Home Buyer/Seller, Foreclosures, Military Specialization, Estate Properties, Reverse Mortgages, etc.
5. **Social Media & Media Channels**
	1. Lender and Realtor leveraging their services via local radio interviews, podcasts, blog posts, video clips, Facebook Biz Page events, LinkedIn reports, PR Releases,
6. **Annual Customer Appreciation Events-Community Events**

**Charitable Promotional Events**

