Borrow Smart UNIVERSITY

1.5 Day Education / Certification Event

Inside:

Registration Form
Event Schedule

Certified Liability Advisor (CLA - designation)

Maximize your investment by learning how to help your clients Borrow Smart Repay Smart®. You'll learn basic steps and advanced strategies through examples, presentations, group activities and role play. Over 1.5 days we'll communicate to you the best of what we've learned in 20 years about how to Manage Liabilities Into Assets™. If you attend, you will find more prospects, retain more clients, and increase your income in

What To Expect:

What mistakes must & avoid? *What are others doing successfully?*

Learn the Borrow Smart approach to find money for your clients, and take your practice to the next level. Designed for loan officers with at least 3 years experience - you'll look at assets and liabilities (and your role) in a totally refreshing way.

- Learn how to deepen client relationships, build wealth, and create an endless supply of new qualified prospects through powerful tested programs used by advisors and lenders nationally.
- Learn how to present the Borrow Smart concepts as a Coach, Facilitator or a paid Instructor.
- Learn to market and grow your practice with powerful Liability Management concepts. We'll show you a single new idea that could change the entire way you conduct business today.
- Learn how Todd built a $500M mortgage business teaching Realtors, Advisors, and Lenders how liability management builds wealth for their clients.
- Learn how the Reverse Mortgage can provide you access to America's wealthiest prospects.
- Learn how to market and brand yourself with dramatic results by collapsing industry barriers between Realtors, Lenders and Advisor.

Planning Check List:

- ☐ **Book flight into airport the night before and plan to fly out several hours after event.**
- ☐ **Book hotel room for two nights.**
- ☐ **Dress is business casual.**
- ☐ **Call your instructor with any questions after receiving your welcome package.**

Class Outline: *(subject to change)*

What is the best way to engage my client?

Day 1:

8:00am to 8:30am ----------------- coffee, pastries, general introductions

8:30am to 9:00am ----------------- intentions, observations, setting course for the day

9:00am to 9:15am ----------------- break

9:15am - 9:30am ------------------- the Resource / Scenario Desk

9:30am - 10:30am ----------------- the Borrow Smart Conversation

10:30am - 11:30am --------------- the Borrow Smart Analysis (software)

11:30am - 12:00pm --------------- Borrow Smart Repay Smart / book and consumer leads

12:00pm - 1:00pm ----------------- Working Lunch (provided by your instructor)

1:00pm - 1:30pm------------------- Virtual Meetings / Virtual Seminars

1:30pm - 2:00pm------------------- E-mail Marketing Systems

2:00pm - 2:30pm------------------- the Borrow Smart Workshops

2:30pm to 2:45pm----------------- break

2:45pm - 3:30pm------------------- the Borrow Smart Workshops (cont.)

3:30pm - 4:30pm------------------- Real Estate and Resulting Tax Impacts

4:30pm - 5:00pm ------------------ Reverse Mortgage Workshop

5:00pm - 6:00pm------------------- Review - Pulling Things Together

7:00pm - 9:00pm ------------------ Dinner (open)

How do I find the right partners?

How do I get started?

How do I virtually eliminate my competition?

Day 2:

8:00am to 8:30am ----------------- coffee, pastries, Day 1 review

8:30am to 9:30am ----------------- the Borrow Smart Instructor

9:30am to 9:45am ----------------- Break

9:45am to 1:30am ----------------- the Borrow Smart Instructor (cont.)

1:30am to 2:00pm ----------------- Wrap Up / Graduation

What one thing makes the biggest difference?