



Training Conference Call Tue 7-22-2014 10am

Call in Number (new) **716-274-3400** Access code: **122150**

1. The FHA Case process for changing to the new Principle Limits available August 4th.
2. Financial planner discussion – How to increase the number of financial planners recommending reverses from the current 7%.
3. Current Index of 2.375 is paying max to the borrower with pricing of 109.625 from Live Well (best)
Live Well accepting Application docs from other lenders, as long as they were originally done by SFI
4. Marketing: 2 Company banners will be available for presentations, shows, and booths. 4' wide by 2.5' high.
12" x 18" Magnetic car door signs are available from Vistaprint for \$12 each if ordered today, regularly they are \$20 each.
5. Successful neighborhood marketing plan utilizing custom door hangers that can print on your printer. They have a personalized message relating to your former clients in the neighborhood.
6. Marketing – Flyers, door hangers, handouts, etc. All marketing material must have the "Equal Housing" logo and must have an effective date no later than the date of circulation (so the information basically expires the following day)
7. Scanning applications and uploading to Reversevision notes section (if not mailing)
 - a. Set scanner to B & W or grayscale (if you need help setting scanner preferences, call Pat)
 - b. Scan at 100 DPI & Make sure it scanned with correct orientation (can't correct this in pdf)
 - c. Scan in order of submission checklist for the lender used. AAG apps print in correct order!!
 - d. Application can be scanned in one or more parts
 - e. To upload, go into the borrower's loan in RV
 - f. On the left, select "Notes"
 - g. At the upper left of the white area, click on "Add New Note"

- h. The cursor will appear at the left of the new note, type in the name of the doc to be added (must be at least 2 words, if you are uploading in multiple parts, number them in order as uploaded)
 - i. Click on the “paper clip” at the right of the note and select the doc to load from your hard drive
 - j. The doc you selected will appear.
 - k. To add another doc, click on “Add New Note” and repeat the process
 - l. Be sure and click on “save” after uploading docs
8. Don't forget required docs with initial application – Credit card form or hold check is required to process the loan and order an appraisal.