

*Build a business worth building*

# 8 PILLARS OF MARKETING AT PRINCETON



# YOUR MARKETING TEAM

For any marketing questions email [marketingrequests@princetonmortgage.com](mailto:marketingrequests@princetonmortgage.com)



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# 70% OF PURCHASE BORROWERS FIND THEIR LENDER THROUGH A REFERRAL.

At Princeton, we don't leave that to chance.

We built an 8-Pillar Marketing System designed to:

- Identify your biggest opportunities
- Increase referral partner depth
- Systemize follow-up
- Create measurable, repeatable growth

This is not random marketing.  
It is structured referral growth.  
And it works.

On average, Princeton Loan Officers add 1.2 new referral partners per month who fund their first loan.



# THE **8 PILLARS** OF MARKETING SUCCESS AT PRINCETON

Orientation & Goal Setting

Realtor Relationships

Customer Relationships

AI Creation

Branding & Value Proposition

Social Media & Content

Community Engagement

Performance Audit

*Pillar 1*

# ORIENTATION & GOAL SETTING

**Foundation First.**

**Objective:**

Lay the foundation and establish measurable goals. This happens in your first 2 weeks.

# WHAT WE DO IN **PILLAR ONE**

- Analyze current marketing assets
  - Database
  - CRM
  - Email list
  - Referral partners
  - Social profiles
- Set Annual Production Goal
- Define 12-Week 1-3-5 Goals
- Update Bio + Social
- Review Princeton 9 + Benchmark Data
- Introduce Sales Training (The Princeton Way)



# YOUR GOALS

- 1 – Main Objective
- 3 – Goals to get to the Main Objective
- 5 – Strategies to Achieve the Goal



## Orientation & Goal Setting

# BIG GOALS FEEL OVERWHELMING.

The **1-3-5 system** turns them into weekly actions you can control.

THE PRINCETON

1-3-5 (Q3 2025)

My 1 Main Objective:

Write 43 loans  
\$13,000,000 volume

The 3 Goals to Achieve the Objective:

- 12 new leads from new referral sources
- 7 loans from existing database
- 8 loans over \$600k

5 Strategies for Reaching Each Goal

Goal #1	Goal #2	Goal #3
12 new leads from new referral sources	7 loans from existing database	8 loans over \$600k
Weekly 5 Strategies	5 Strategies	5 Strategies
4 face-to-face 1:1s	Build & use 501 Reach App	Target higher price point agents
3 "13 in 30" calls	50 Past client calls this quarter	Target top listing agents
3 Gifts	Voice Broadcast	Offer "second look" service
75% Power Hour Attendance	Rewrite Top 50	Promote jumbo strategy content
1 Agent Happy Hour this quarter	Reach out to all reviewers	Push Chase community product

*Pillar 2*

# **BUILDING REALTOR RELATIONSHIPS**

**Stay in FLOW.**

**Objective:**

**Create a measurable  
prospecting plan to increase  
Realtor partner relationships.**

# GROW YOUR BUSINESS WITH *Flow*

When it comes to customers and partners, you create value by being likable and trustworthy, solving their problems, and making them feel good.

You'll also need to be in what we call flow with them. Flow is the frequency of interactions with people – face-to-face, on the phone, through the mail, through email, through social media. The key is that these interactions need to create value; they should not be annoying mail, email, or phone calls from an annoying salesperson.

### HERE'S WHAT WE KNOW

According to market data, Loan Officers average 2 loans per referral partner per year. If you close 60 loans, you most likely have 30 referral partners.

(EXAMPLE): Over the next 12 months, if you want to go from 3 loans per month to 5 loans per month (from 36 loans annually to 60 loans annually) - you will need to go from working with 18 referral partners to 30 referral partners.

### THE RESULTS:

On average, Loan Officers working our FLOW system close 1 loan per month for every 20 referral partners they are in flow with..



### **IN FLOW MEANS:**

- Have met face-to-face
- Initiated a 13 in 30
- Weekly automated touchpoint  
(can be email)
- Quarterly blueprint conversation

### **WHAT DOES SUCCESS LOOK LIKE?**

LOs who successfully work the system,  
speak/meet with 33% of FLOW Database  
per month and 100% of FLOW database  
per quarter

## Building Realtor Relationships

# LET'S RUN YOUR NUMBERS

- Current Production
- Target Goal
- Loan Delta
- Referral Partner Math
- Flow Math

<b>John Smith</b>
<b>Goal: \$37.5M in annual production</b>
Assuming loan size: \$381,000

Annual Historical	Actual	Goal	Under/Over Goal
Trailing 12 months Closed Units	73	98	25
Average Size	\$381,000.00	\$381,000.00	\$-
Trailing 12 months Closed	\$27,881,510.00	\$37,500,000.00	\$9,618,490.00

Monthly Averages	Actual	Goal	Under/Over Goal
Trailing 12 months Closing Units	6	8	2.1
Average Size	\$381,000.00	\$381,000.00	\$-
Trailing 12 months Closing Loans	\$2,323,459.17	\$3,125,000.00	\$801,540.83

FLOW STRATEGY	
Goal - Monthly Closed Loans (units)	8.2
FLOW Goal (Realtors)	164
Conversations per quarter	164
Conversations per month	55
Conversations per week	14

# WALLET SHARE ANALYSIS

- Realtors doing 6+ buy side transactions
- Less than 33% wallet share
- Sell-side agents with buy-side potential

Your next 25 loans may already be in your book.

FLOW STRATEGY	
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FLOW Goal (Realtors)	164
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Conversations per week	14

OPPORTUNITIES WITH CURRENT REFERRAL PARTNERS	
Buyside	23
Sellside	37
<b>TOTAL</b>	<b>60</b>

# HOW WE WILL GET THERE

**WITHOUT A GOAL AND A PLAN, IT'S JUST A WISH. TO GET IT, YOU HAVE TO EARN IT.**

## YOUR FIRST FEW WEEKS:

- Review 2025 current referral partners, complete wallet share analysis
- Develop a database of target Realtors you want to work with (Realtors should have done a minimum of 8 buy-side transactions over the last 12 months)
- Create and implement your weekly roadmap
  - 13 in 30s (3-5 per week)
  - Complete Blueprint Trainings
  - Attend weekly community events
  - Attend and / or co-host open houses
  - Host / sponsor events monthly or quarterly depending on size and purpose
- Implement a post-closing referral marketing plan
- Implement a listing agent referral plan

## Building Realtor Relationships

# We make you look good **THE 13 IN 30**

Princeton's proprietary FLOW system. Thirteen touchpoints in 30 days and is proven to help Loan Officers add 1.2 new referral partners a month who fund a loan with Princeton for the first time.

### 1. COLLISION

We call this your \$1,000 per hour work!

Initial Contact: Meeting a new potential referral partner at an open house, the grocery store, a Facebook group, etc.

### 2. CONNECT ON SOCIAL MEDIA

On average, people spend 2 hours and 24 minutes a day on social media. Meet them where they are and build trust quickly.

### 3. HANDWRITTEN NOTECARD

One of the best ways to show gratitude and make people feel special is by sending a handwritten notecard in the mail. It sounds basic it is. It works because most people don't do it.

### 4. COOKIE

This is where it gets really sweet (pun intended). A cookie will be sent on your behalf to your referral partner's home. To say referral partners love it is an understatement.

"How cute is this? I love when people go the extra mile these days..." - Elizabeth

"Thank you for the treat that came in the mail today! I look forward to working with you and Princeton Mortgage soon." - Kathy

## 5. 6. AND 7. POSTCARDS

Stand out with direct mail!

Mail tends to be more effective than email – because there is less of it today than ten years ago. You are actually more differentiated with snail mail today. We find the best results with a combination of mail and email.

## 8. 9. 10. AND 11. EMAIL

Following the cookie and each postcard delivery an email will be sent on your behalf to your referral partners. We spend a ton of time writing these emails. Our goal is to make them as valuable (solve a problem or make them feel good) and customizable as possible.

## 12. SOCIAL MEDIA RETARGETING

As soon as the first postcard hits their mailbox, referral partners will start receiving Facebook and Instagram Princeton Mortgage ads in their personal social feeds. They will start to see Princeton everywhere - mailbox, inbox, social feeds. It is hard for you not to be top of mind.

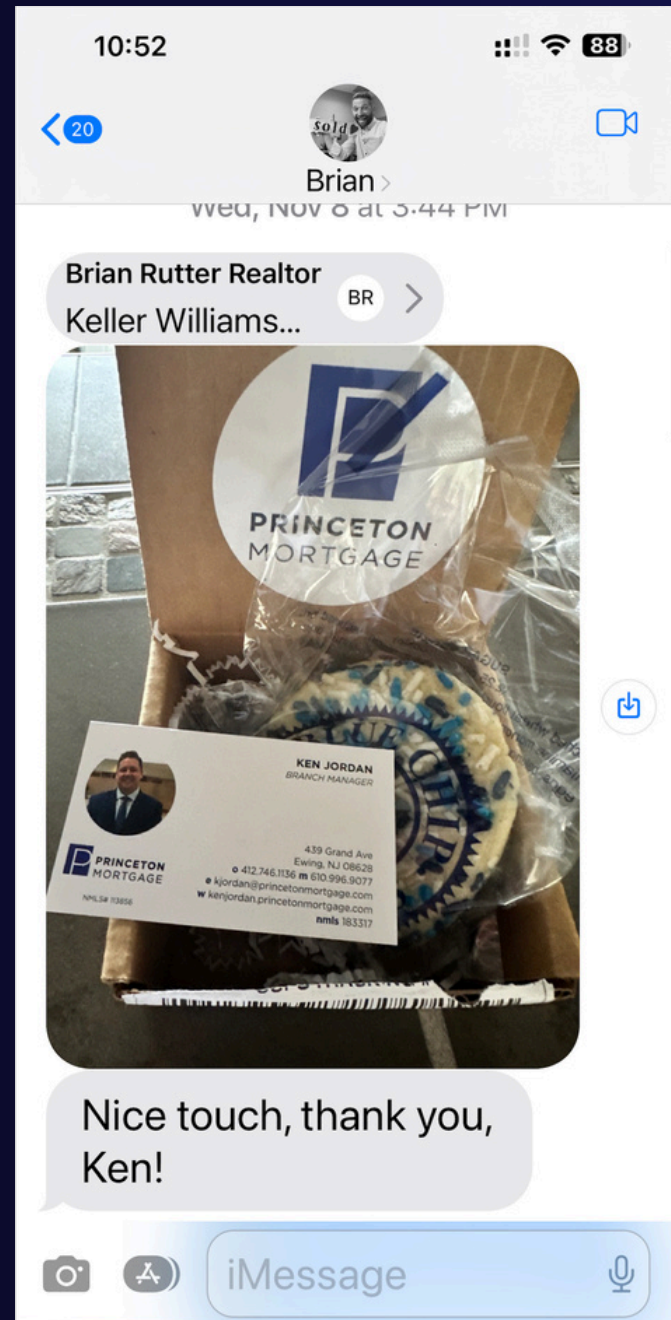
## 13. PHONE CALL

The most valuable touchpoint is a face-to-face interaction - your first touch point. The second most valuable touchpoint is a phone call. The final step is a phone call to ask for a meeting.



# Realtor Feedback

## DON'T TAKE OUR WORD FOR IT



## Building Realtor Relationships

# THE *Blue Print*

STRATEGIES TO GROW YOUR PARTNER'S BUSINESS.

A Quarterly Magazine for Realtor Conversations

A structured, high-value resource designed to help you:

- Show up with purpose
- Educate and train agents
- Lead valuable business conversations
- Create a reason to call and meet

Each edition gives you practical strategies you can walk through one-on-one or in a lunch & learn setting.



“WITH THE BLUEPRINT, YOU’RE NOT ASKING FOR BUSINESS. YOU’RE HELPING REALTORS GROW THEIRS.”

*Pillar 3*

# **BUILDING CUSTOMER RELATIONSHIPS**

**Consistency & Connection**

**Objective:**

**Create a FLOW system for past clients and future borrowers.**

# TOTAL EXPERT

## Your All-in-One CRM and Marketing Platform

Total Expert serves as a comprehensive CRM and marketing platform, empowering you to streamline your operations and automate your marketing efforts. Not only does Total Expert offer centralized data management, but it also runs your FLOW systems and provides multimedia marketing tools to effectively reach your clients and partners.

When you log in, you should immediately know what to do.

- **Who to call today**
- **Your hottest leads**
- **Top referral partners**
- **Active transactions**
- **Alerts and opportunities**

## Building Customer Relationships

Why should you use it?

- The dashboard allows you to track your prospecting activities and sales productivity
- Take advantage of 20+ drip campaigns for clients and partners:
  - Cold lead journeys
  - Raving fan journeys
  - Pre-approval journeys
  - In-process journeys
  - Seven-year post-closing campaigns
  - Birthday and anniversary emails and alerts
  - Monthly newsletters
- Customer monitoring:
  - Rate watch
  - Equity watch
  - Listing watch
  - Credit Monitoring
- Robust library of marketing collateral (social media, flyers brochures)
- Co-marketing capabilities with your preferred partners

*Pillar 4*

# AI CREATION

This is new power.

Objective:

Harness AI to scale relationship-building.

*Pillar 4*

# CUSTOM- BUILT GPT SYSTEMS FOR LOAN OFFICERS

Princeton provides centralized access to custom AI tools built specifically for your business.

These GPT-powered projects help you:

- Streamline follow-up and partner communication
- Generate compliant marketing content
- Improve open house strategy
- Create faster borrower messaging
- Reduce manual work across your workflow

Each system is built with structure, compliance, and professionalism in mind.

*Build a*  
**DIGITAL  
YOU**

- Digital You Interview
- Capture Tone
- Build Custom GPT
- Realtor FLOW scripts
- Borrower communication
- Social media ideas

# AI IN *action*

- Realtor follow-up scripts
- Open house follow-up
- Listing agent outreach
- Social captions
- Client pre-approval explanation

*Pillar 5*

# **BRANDING & VALUE PROPOSITION**

**What makes you stand out.**

Objective:  
Define your niche.

## Branding & Value Proposition

Building a personal brand as a mortgage loan officer is crucial for standing out in a competitive field, establishing trust with clients, and attracting new business. A strong personal brand sets you apart, conveying professionalism, expertise, and credibility. It not only attracts clients but also encourages referrals and fosters long-term success.

By working with our team to create your personal brand, you position yourself as a trusted expert, adapt to industry changes, and create a loyal client base that continues to seek your services over time.

**GREAT RATES. LESS EFFORT.**

**TOP 1% IN CUSTOMER SATISFACTION**

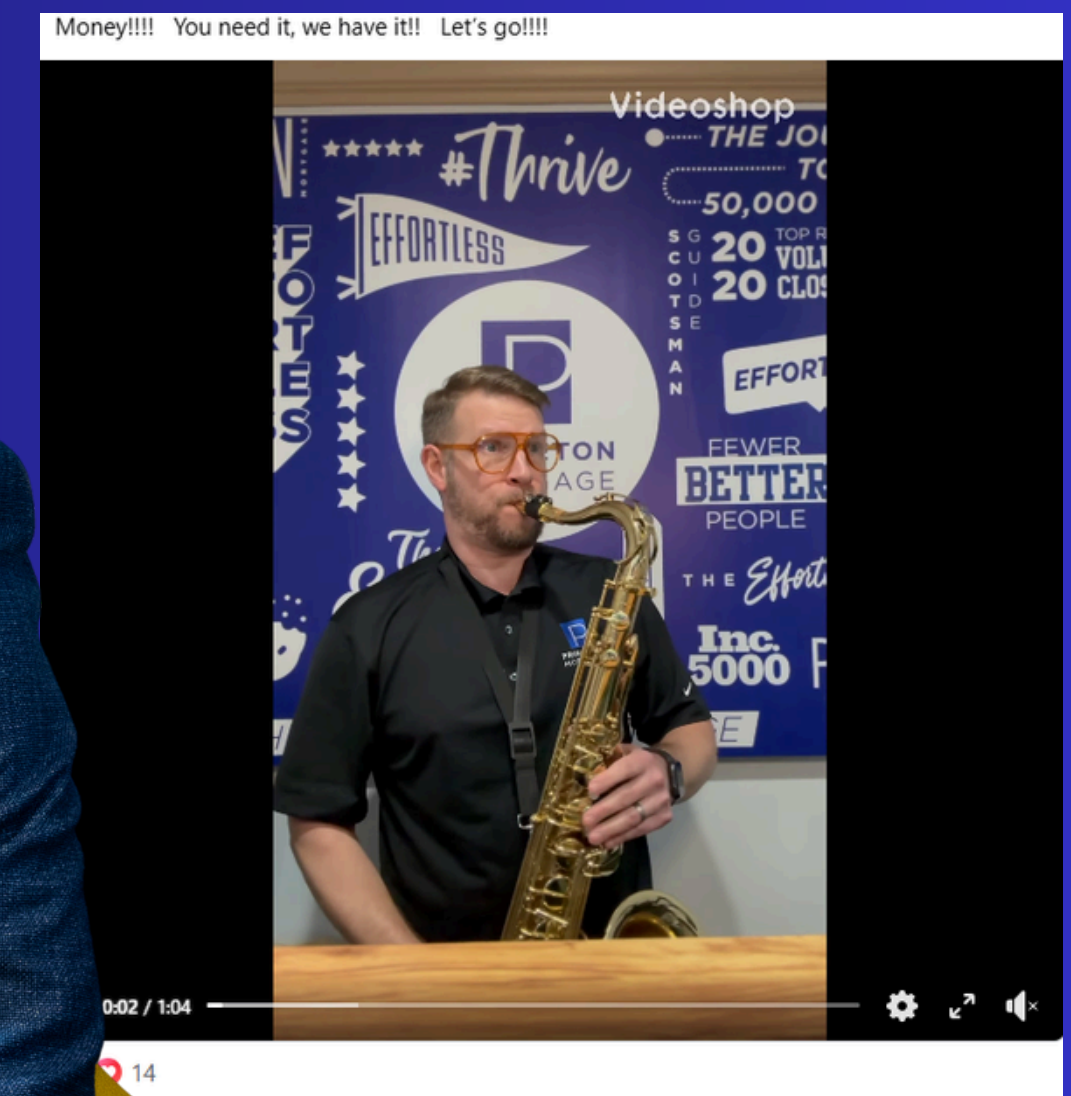
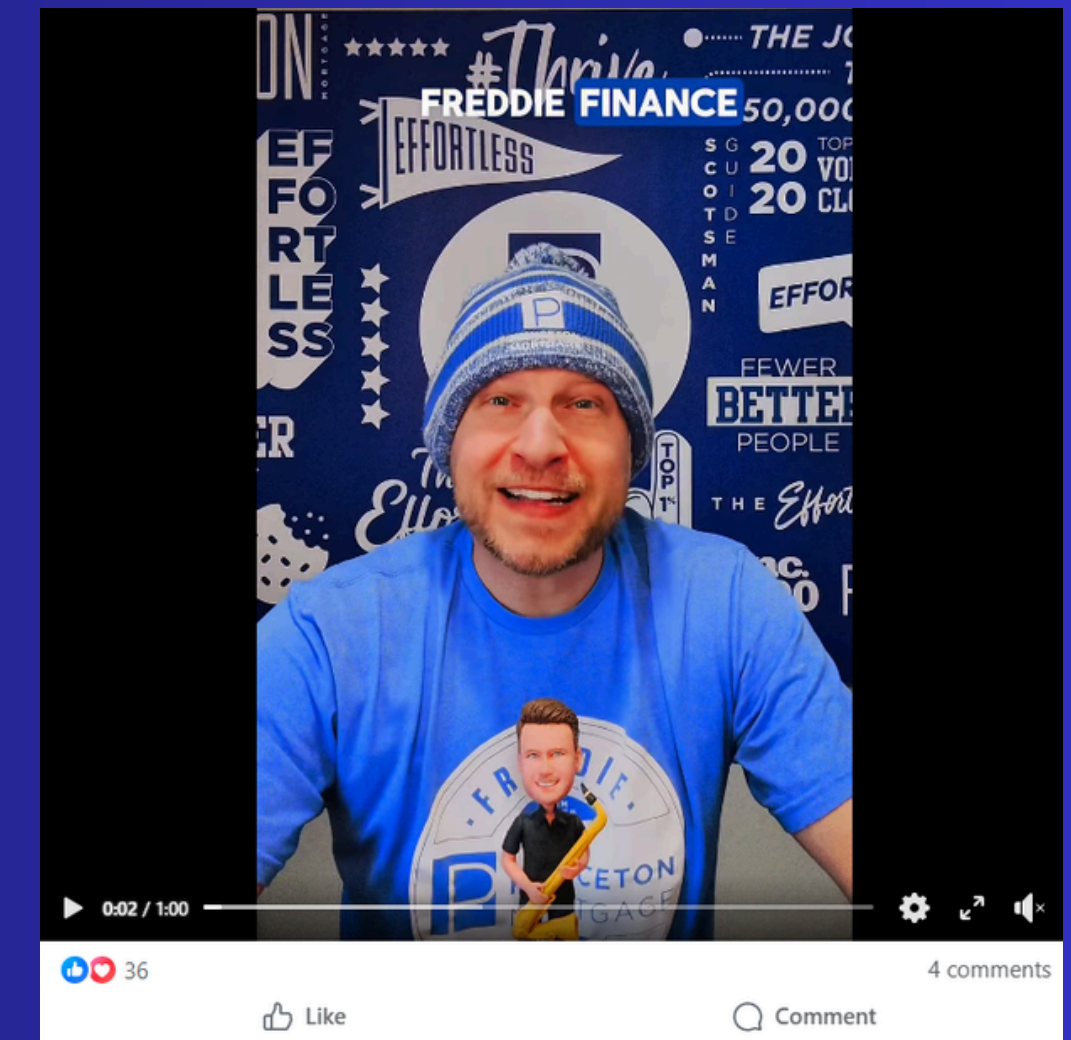
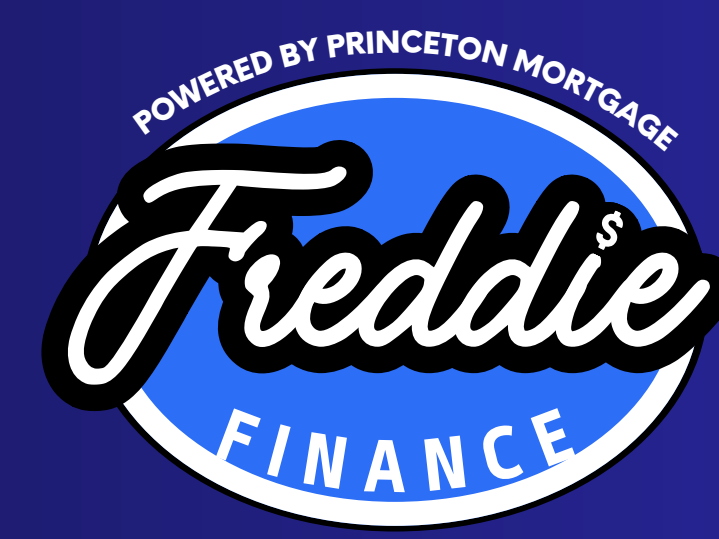
# KEN JORDAN



Most agents post listings.  
Alexis Marie Pierce posts history.  
And it's working.  
On this episode of Realtor Rapid Fire, Alexis shares how creating short social videos about the area — not just the house — is driving engagement and building conversations.  
We also talk about:  
Getting communication boundaries without losing trust  
Staying top of mind with seasonal follow-up  
And why she can "bake cupcakes and close deals in the same hour."  
If you're in real estate and looking for ideas that are simple but effective, this one's worth 5 minutes.



# FREDDIE FINANCE



# MARKETING ONBOARDING

Work together to create your initial 90-day Marketing Strategy

- Build Your Personal Brand
- Custom and Standard Business Cards
- Dynamic LO Websites
- Personalized About Me One-Pager / About Our Branch
- Custom and Standard Email Signature
- I've Joined A New Team Social Media Graphic
- Here We Grow Shout Out from the EVP, National Sales Director on LinkedIn
- Database Management:
  - We will work with our preferred data partner to identify all of your past referral partners and past clients
- Announcement Emails:
  - I've Joined A New Team Email (Realtors)
  - I've Joined A New Team Email (Past Clients)
- I've Joined A New Team Postcard
- Press Release
- 13 in 30 Custom Postcards
- 30-day Marketing Technology Training
- Social Media Compliance
  - One-on-one coaching session to update your social media profiles and create your social strategy



# Branding & Value Proposition

## What do you specialize in?

### Examples:

*VA Specialist*


*First-Time Buyers*

*Senior Living*

*Luxury*

*Fire / Police*

*Investor*



**UNLOCK EQUITY.  
FUND CARE.  
STAY IN CONTROL.**

Navigating care and housing decisions for a loved one—or yourself—can feel overwhelming. I help homeowners access smart mortgage solutions to cover long-term care, medical costs, retirement needs, or simply stay in the home they love.

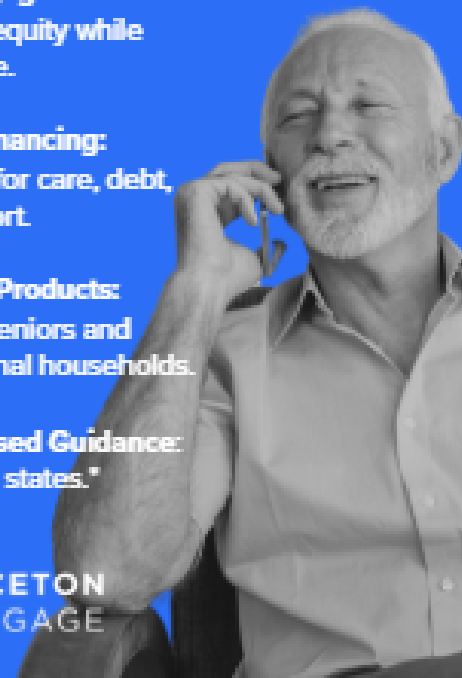
**SOLUTIONS FOR EVERY GENERATION:**

**Reverse Mortgages:**  
Access home equity while staying in place.

**Cash-Out Refinancing:**  
Free up funds for care, debt, or family support.

**Tailored Loan Products:**  
Designed for seniors and multigenerational households.

**Trusted, Licensed Guidance:**  
Available in 40 states.\*



**PRINCETON MORTGAGE**



**PRINCETON MORTGAGE**

The Silver Tsunami Is Here  
**ARE YOU READY TO RIDE THE WAVE?**

**The Two Types of Senior Buyers:**

**1. The Next-Chapter Explorer**

- Has equity, wants a fresh start
- Buys to renovate, decorate, live fully
- Seeks homes that fit evolving lifestyle needs

**2. The Transition Navigator**

- May need care, support, or help downsizing
- Seeks simplicity and financing that helps make fast decisions
- Often influenced by adult children or advisors

**Want to be the go-to agent for senior buyers? Let's talk.**

**Why This Matters:**

- Seniors control more wealth than any other group
- Many own their homes outright and are ready to move
- The right loan partner makes complex transitions effortless

**Use tools like:**

- Reverse Mortgages
- Equity Cash-Out
- Bridge Loans
- Low-Documentation Financing Options

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*Pillar 6*

# **SOCIAL MEDIA & CONTENT CREATION**

**Three Levels:**

Level 1 – Daily Social Nudges

Level 2 – Coaching

Level 3 – Custom Content Production

## Social Media

**Visibility Builds Trust**  
**You don't need to go viral. But you do need to be visible.**

A consistent digital presence helps you:

- Stay top of mind
- Build credibility
- Attract partners and clients
- Compete in today's market



## Social Media

### LEVEL 1 — Daily Social Nudges

Not sure what to post?

We send ready-to-use content you can share across your platforms.

### LEVEL 2 — Coaching & Training

Need direction or strategy?

We offer group sessions and 1:1 coaching to help you build confidence and consistency.

### LEVEL 3 — Custom Content Production

Want a fully developed presence?

We partner with you to create branded, strategic, done-for-you content.



*Pillar 7*

# COMMUNITY ENGAGEMENT

**Host Smart. Grow Faster.**

**Objective:**

**Create meaningful in-person and  
online interactions**

## Community Engagement



### Choose 1 for next 12 weeks:

- Happy Hour
- Lunch & Learn
- Open House Strategy
- Webinar
- Local Sponsorship

## Community Engagement

# HAPPY HOURS

Happy Hours are designed to strengthen Realtor relationships and expand your referral network in a natural, low-pressure environment.

This format works best when you want to:

- Deepen existing relationships
- Invite new prospects into your world
- Create informal but meaningful conversations

Two options:

Promo Package – You manage logistics. We power the marketing.

Full-Service – We plan, promote, and structure it. You host.



## Community Engagement

# LUNCH & LEARNS

Lunch & Learns are high-value training sessions that position you as a strategic partner — not just a lender.

This format works best when you want to:

- Provide actionable education
- Enter a new brokerage office
- Strengthen authority within an existing office
- Deliver Blueprint conversations at scale

Two options:

On-Demand Kit – Plug-and-play value.

Custom Experience – Fully branded, strategic office play.



# BOOTHS & CONVENTIONS

Booths and conventions create high-volume exposure opportunities — but execution matters.

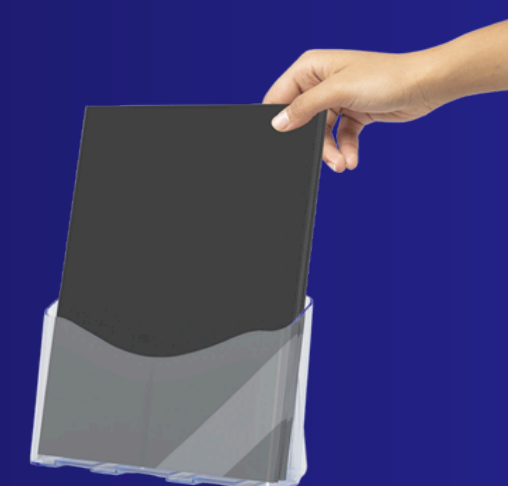
This format works best when you want to:

- Increase brand visibility
- Support agent events
- Capture leads professionally
- Expand into new audiences

Two options:

Shared Booth Essentials – Use Princeton’s professional setup.

Custom Booth Build – Scalable branded presence with marketing support.



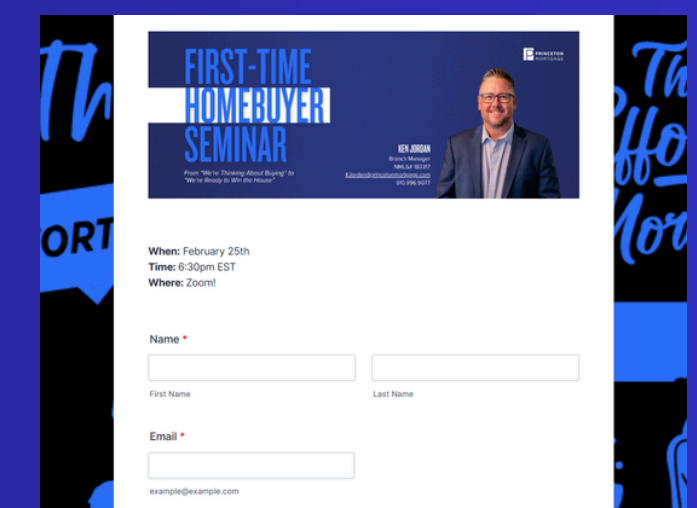
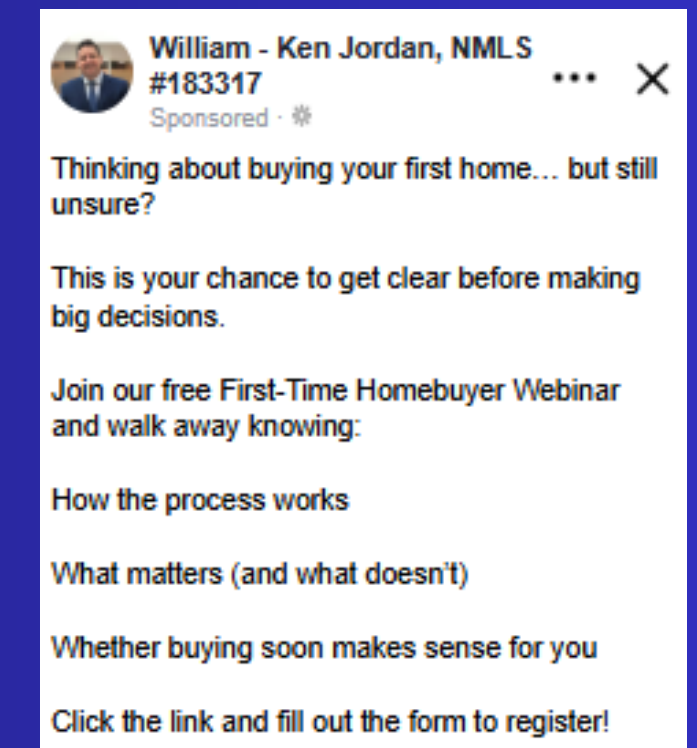
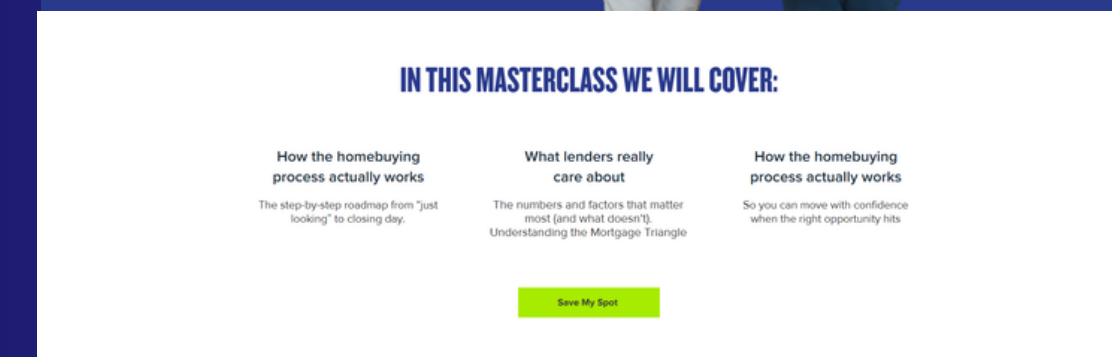
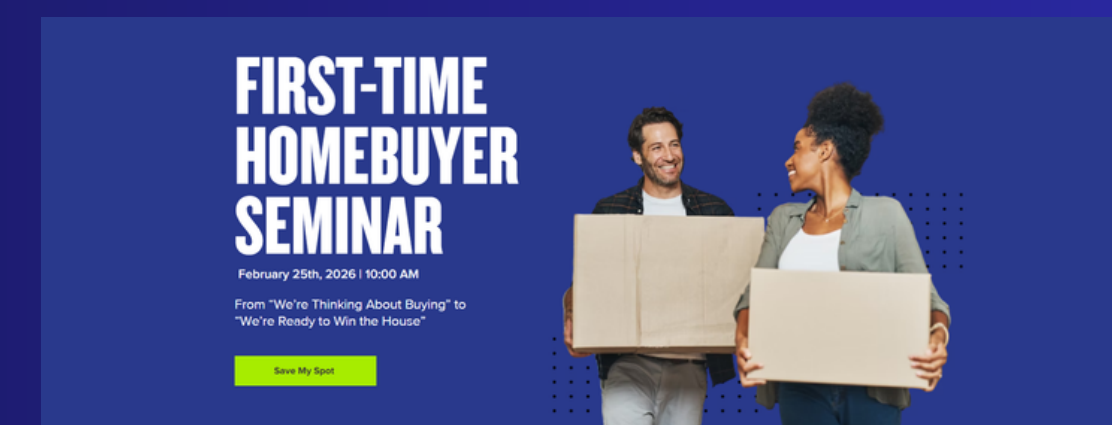
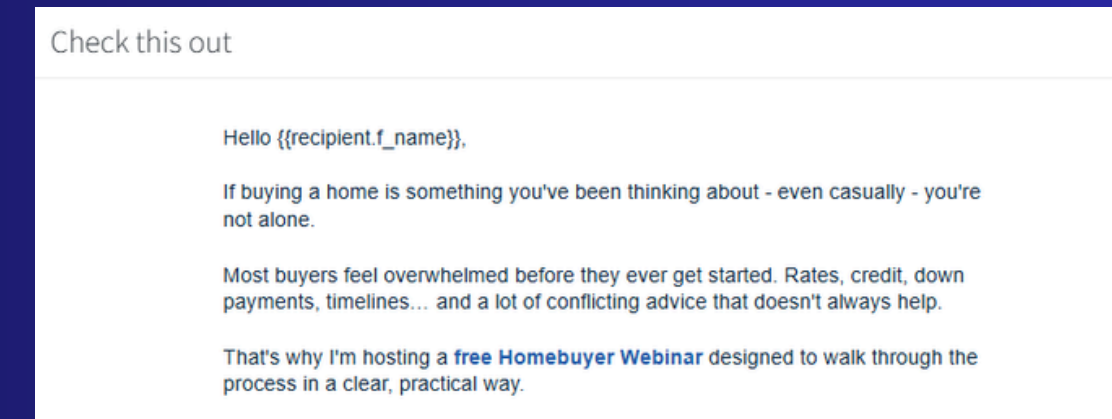
## Community Engagement

# WEBINARS

When you choose a webinar package, you receive:

- Dedicated strategy calls to define topic and audience
- Full webinar platform setup
- Custom registration page
- Branded slide deck (built or refined by marketing)
- Email invitation sequence
- Reminder emails
- Post-event follow-up emails
- Facebook Ads
- Custom Landing Page
- Attendee tracking and registration reporting

Your presentation becomes a repeatable marketing asset that can be reused, repurposed, and integrated into your FLOW system.



*Pillar 8*

# PERFORMANCE AUDIT

**Check In Regularly & Assess**

**Objective:**

**Assess and refine.**

- Monthly check-ins
- FLOW tracking
- Social performance
- Event ROI
- Double down on what works

# SALES TRAINING & COACHING

## THE PRINCETON WAY

The Princeton Way is a structured roadmap for becoming the type of Loan Officer capable of sustained success.

This eight-module program equips you with the mindset, skillset, and habits needed to build a business worth building.

Each module strengthens your foundation, sharpens your strategy, and prepares you to navigate challenges and seize opportunity. Commit to the process. Execute consistently. Grow intentionally.

## WEEKLY SALES TRAINING

At Princeton, we see ourselves as a world-class professional team. The fact is, no matter how gifted the athlete, without training and practice they will never hit or maintain their peak.

Princeton Loan Officers receive free sales training once per week. Coaching is free for all LOs hitting minimum standards.



# **YOUR FIRST 30 DAYS**

**WEEK 1&2: PILLARS 1–3**

**WEEK 3&4: CHOOSE GROWTH PILLAR**

**MONTH 2+: EXECUTE & TRACK**

**WITHOUT A GOAL AND A PLAN, IT'S JUST A WISH.**

**LET'S BUILD SOMETHING WORTH BUILDING.**

# LOOK GOOD. FEEL GOOD. PLAY GOOD.

When you wear Princeton gear at open houses, events, community gatherings, or even in your daily life, you're increasing brand exposure and creating natural touchpoints.

Professional. Recognizable. Consistent.  
As part of your onboarding package, every new hire receives: \$100 to the Princeton Merch Store

**USE CODE: NEW100**





**QUESTIONS | COMMENTS | FEEDBACK?**