

From contacts to contracts

7 top referral sources for savvy loan officers*

Strong referral partnerships build a pipeline for lasting growth. Here's how to nurture ties with these top 7 referral sources.

1. Past clients

Turn satisfied clients into your best advocates by offering post-purchase resources, tips and local recommendations. Show that you care with personalized notes on birthdays, home purchase anniversaries or other milestones.



2. Real estate professionals

Become an indispensable resource at open houses. Educate your real estate agent partners on the mortgage process. Elevate your partnership by co-hosting homebuyer seminars or creating co-branded guides.



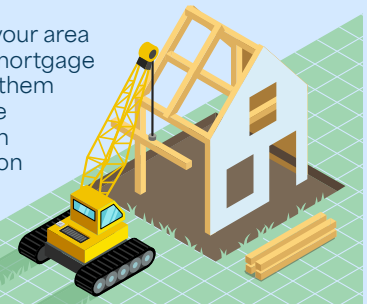
3. Friends & family

Don't be afraid to talk about what you do with your social networks as well as your professional networks!



4. Home builders

Reach out to builders in your area and find out if there are mortgage pain points you can help them address. Engage in online builder forums to position yourself as the authority on new home financing.



5. Financial advisors & CPAs

Offer specialized products that seamlessly fit into wealth management strategies. Become a resource for purchase and refinance scenarios.



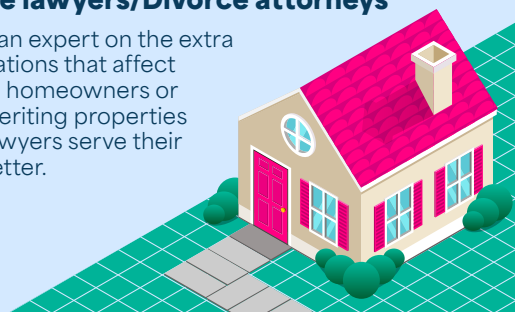
6. Community organizations

Work with local groups that focus on building stronger neighborhoods. Sponsor local events. Make connections based on your interests that can help you find a niche.



7. Estate lawyers/Divorce attorneys

Become an expert on the extra considerations that affect divorcing homeowners or those inheriting properties to help lawyers serve their clients better.



Ready to turn your network into net worth?

Explore our curated resources to help you build lucrative referral partnerships.

mgic.com/referral-building

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