

A mortgage
just isn't
a mortgage
anymore.

 **ADVISOR MORTGAGE**



increased
earnings

increased
referrals

When you make that pivotal decision to grow your business and incorporate AdvisorMortgage in your daily practices, not only will you increase your earnings, but you will also see an increase in your referral activity.

“I must admit that I was somewhat reluctant to try and originate my own mortgage. In the past, I have always used a mortgage firm. Therefore, I was somewhat intimidated by the whole process. However, I found the experience to be very simple, and Ashley was an absolute pleasure to work with. Now that I have experimented on myself, I would not be reluctant to discuss this service with any of my existing clients. It has been a great experience to work with you and your entire organization.”

W. Roger Seigler CLU, ChFC
President
Pilot Financial Advisors

Building relationships with financial professionals nationwide since 1993.

strengthened
client relationships

Our Company

Since 1993 AdvisorMortgage has been working exclusively with financial professionals, offering mortgage financing in all fifty states and offering the most competitive interest rates and products on a national basis. One of the many focal points of our customer service is to surpass every expectation they have and provide them with a superior customer experience. From the initial contact to closing, our employees in each department are with the customers every step of the way. AdvisorMortgage is a private company. We do not solicit mortgages directly to retail customers. Our only business is serving the needs of qualified investment professionals. We believe you owe it to your clients to use AdvisorMortgage to expand your portfolio of services to include real estate finance.

AdvisorMortgage Promises To You, the Financial Professional, For Your Clients:

- + Consistent mortgage rates below the national average
- + No hidden fees and no origination fees unless you choose to charge them
- + Same day response
- + Non-competitive partner, as opposed to banks who compete against you
- + Will not cross-sell your clients based on their assets
- + Will treat your clients with the courtesy and respect they deserve

Compensation To You, the Financial Professional

Compensation for you, the Financial Professional, can be a prosperous revenue builder if you choose so. For every loan that you refer, you receive \$350. We generally encourage our planners to make more than \$350 for every loan, but every situation is different. Planners that seek out to make more than \$350 per loan can choose to make as much as a point off of every loan they refer. To achieve this higher compensation goal, simply collect any extra documentation we need from the customer throughout the process of the loan. It's that easy



courtesy
& respect

revenue
builder

We Value Your Expertise

We at AdvisorMortgage want to provide a service that can build on your overall portfolio of business. We offer compensation, so that our service can be a revenue builder as well. But, most importantly, we feel that you should be involved in all of your client's big financial decisions. Protect yourself from local bank competition, which may offer many investment products and attempt to cross sell the client. A mortgage is a big financial decision, and you hold the power to increase cash flow or build on many different financial planning platforms for the future by using several different AdvisorMortgage programs and products. These programs and products have been developed specifically for the financial planner's client base. We do not require training or for you to become an employee of the company. You are a financial securities expert, and AdvisorMortgage is the expert in mortgages. Let us take care of all the different scenarios for you; you can then advise as to what would be best for the client. A mortgage is not just a mortgage anymore. There are specific products and programs that fit many different clients' needs and expectations. We are here to service your business and build another revenue stream for you. So let's start working together today!

Building Relationships One Loan at a Time

Customer service over the years has continually separated good companies from great ones. Our ownership and staff at AdvisorMortgage views customer service as more than just a friendly smile and hello. We want to be judged by what we do and not what we say. The moment our customer has arrived, it is vital that we provide him or her with an excellent customer service experience from initial contact until after the loan has closed. We only have one chance to make the first impression, and we promise you - the customer's experience will be a pleasant one. Providing exceptional customer service is the first of many steps in building a great relationship. Those relationships allow us to differentiate ourselves from being a good company - to being a great one.



product
variety &
flexible loan
options

build your
portfolio

excellent
customer
service
experience

Building relationships with
financial professionals
nationwide since 1993.

Our Products

Residential Real Estate Loans

- + First Mortgages (Fixed and Variable Rate)
- + Second Mortgages (Fixed or Adjustable Home Equity Lines of Credit)
- + Flex Mortgages or Combination (Combo) Mortgages
- + Purchase or Refinance, Cash-out or Rate and Term
- + Primary, Second Home or Investment Properties

Commercial Loans

- + Bridge Loans (\$300,000 to \$3,000,000)
- + Premier Investor NON Recourse Loan (\$2,000,000 to \$30,000,000)
- + 1003 Commercial Express (\$300,000 to \$2,500,000)
- + Purchase or Refinance, Cash-out or Rate and Term

Documentation Types

- + Full Document-complete income and asset disclosure
- + Stated Income-perfect for self employed borrowers
- + No Document-for those who don't mind a slightly higher interest rate but who prefer not to disclose income or assets



We Are AdvisorMortgage

We are AdvisorMortgage, an innovative national mortgage lender founded to provide unmatched service to our clients and committed to providing professional expertise and a positive loan experience. We provide mortgage products to prominent financial planners nationwide who offer our services and products to the widest economic range of clients. Our products and services are set apart on the basis of quality, customer service and a value that can be trusted. We believe any mortgage company can simply provide a loan. When we work with our clients, there is more to look at than just a mortgage; it is a multi-step process to something much bigger. The ultimate goal on every loan is to meet every client's specific goals, surpass their expectations, and differentiate ourselves from traditional retail focused lending institutions. Our company was founded to understand that our services are but one spoke, in a wheel of complex financial strategies.

“Our affiliation with AdvisorMortgage has definitely strengthened our client relationships. The loan officers are first class, knowledgeable professionals working with our clients to make the process as pleasant and painless as possible. They have been very good about keeping us informed of the client's loan status and also communicating directly with the client to obtain the necessary information to make the process seamless. Each loan officer is experienced; working only with financial professionals, they understand how to be proactive to my needs.”

Chris Whited
Wealth Advisor, Senior Partner
First Financial Group

Building relationships with financial professionals nationwide since 1993.



top notch
service
consistently
meet
expectations

Let's Get Started

Getting started with AdvisorMortgage is a simple and smooth transaction.

- + Complete and fax the “Printable Loan Application” included in your welcome package. This application may be completed with a rep over the phone, or you can visit our website and complete an online application.
- + Our loan officers will contact you first to discuss your borrowers' loan request, and then will contact the borrower to discuss all options and finish the loan request. Our loan officers will prepare and deliver your borrower's completed loan package either through mail, email, or by web delivery at AdvisorMortgage.com.
- + Once a loan package is received, our loan officers can review the package for accuracy, offer to lock the loan, order the appraisal and necessary title work, and submit the loan request to our processor and underwriting staff.
- + It is the responsibility of the loan officer to keep you informed of each process as it progresses. You will receive email notifications through each step. Once the approval is received from our underwriting staff, the loan processor will contact the borrower to schedule the loan closing.

“As a Certified Financial Planner, I recently met with a client who was concerned about his interest-only mortgage that he had been paying the past three years. His financial situation had changed because of a new job and a child in college. After reviewing his current financial situation and the fact that interest rates were heading up, we decided to look into refinancing his home to a fixed rate mortgage. That day I gave Jim Shaw a call and reviewed my client's situation with him. The next day Jim forwarded me a list of options he felt best met my clients needs. I reviewed these with the client and he decided on a traditional 30 year mortgage to best meet his long term needs. He also was able to lock in the current mortgage rate. The application was forwarded to my client that day, and the loan process began. I have to say this was the fastest loan closing I have ever experienced. My client was refinanced with a great rate in only three weeks time. I was also able to recommend a local real estate attorney to do the closing for AdvisorMortgage, and everything went smoothly. Thanks again, Jim, to you and your people for making this happen in a fast, efficient and professional manner.”

Christopher Picone
Certified Financial Planner
Winchester Financial Group, LLC





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