

SALES MASTERY

2018

game
CHANGERS





The Future is Here!

Do you have a vision for the next 24-36 months?

Are you confident in your plan and do you know what to do every day to achieve it?

Do you have daily accountability in key performance areas?

If you said no to any of these questions, there's an odds on chance you would benefit from having a coach!

I want to personally invite you to upgrade your business and your life.

Come talk to a Coach at our High Trust Coaching booth.

It's a Game Changer!

game CHANGERS

Welcome to Sales Mastery 2018! Welcome to Game Changers!

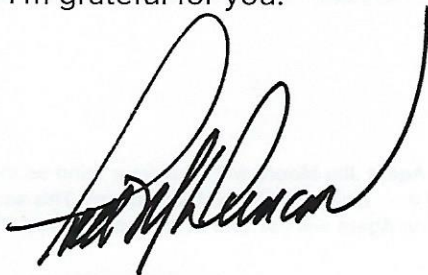
This is my favorite time of year. This is when I turn my eyes toward the New Year and begin to make the plans for my next, best year ever. I have learned how you end the year has a lot to do with how you start the next year and why I positioned Sales Mastery to coincide with the 4th quarter.

I'm so grateful that you made the decision this year to attend Sales Mastery! For 26-years, Sales Mastery has happened every fall to be a place where you can gather with other thirsty, hungry and committed mortgage professionals to learn, grow and get better.

This has been a hard year for the industry. We have and will continue to see a lot of changes that we are going to have to navigate and own if we are to have the career of our dreams. This is the time where you are going to have to dig deep, really assess your skills, and learn how to position yourself as a contender in the sea of sameness and disrupt your local markets with value and service.

It is my hope that by the time this event is over, you will have everything you need to position yourself for greatness in the months and years to come. It is also my hope that you are transformed in new, fresh and rich ways so that your life can continue to become all that you envision.

I'm grateful for you!



Todd Duncan
CEO & Co-Founder
The High Trust Company

NAME/NUMBER

RACHEL
PORTER



AGENDA

Day 1: Wednesday Oct. 10th

1:00 PM - 3:30 PM

Leadership Live!

New York Times Bestselling Author, Todd Duncan, along with futurist, author, strategic thinker, and former chief evangelist at Intel Corporation, Steve Brown, talk about the impact of AI, Blockchain, and other technology shifts occurring that will impact mortgage origination. Also, Regional President and former \$100M Top Producer, Brian Bomar and National Sales leader, Tim Broadhurst, will share insights to increasing trust as a leader, building high-performance sales teams, and creating a winning culture. Nothing is off limits to talk with these leaders about!

6:35 PM - 8:30 PM

Sales Mastery 2018 Opening Keynote with Todd Duncan

I Am Not A Robot – Todd Duncan kicks off the 26th Sales Mastery event with a gripping and compelling message on CHANGE. Stay a step ahead of the change through which the industry is going. Become your own force of change. Todd is passionately clear on what it takes to win and will share a series of six universal laws that will equip you to owning your future and win big no matter what the market conditions might throw your way!

Day 2: Thursday Oct. 11th

8:00 AM - 8:15 AM

I Todd Duncan Morning Kickoff

8:15 AM - 8:30 AM

I Power Shot for Health with Jonathan Roche

8:30 AM - 10:00 AM

Edge of Disruption with Best-Selling Author Peter Sheahan

MATTER: Finding opportunity in disruption to create more value and become the obvious choice. As the pace of commoditization accelerates and the emergence of technological disruption threatens our existing business models, we must find ways to remain relevant and differentiated in the hearts and minds of our customers! This inspiring, case-study rich session will show you how to find opportunity in disruption to reverse the downward spiral of commoditization and matter more to your customers than your competition. This journey will require that you: elevate your Value and understand the difference between value creation and value extraction; elevate your Boldness and move towards the very disruption that challenges you and your customers; elevate your Impact in the Five Critical Dimensions that clients and customers value most during times of rapid change; elevate your Perspective by learning at the 'Edge of Disruption' and becoming a thought leader in the business models of tomorrow; elevate your Relationships to position you not just as a trusted adviser but as a strategic partner for your customers and act in a way worthy of your desired leadership position.

10:00 AM - 10:45 AM

I Break – Experience our Resource Partners

10:45 AM - 11:30 AM

The Ultimate Lender Agent Partnership

ELITE Originator Marty Preston and Superstar Top Producing Agent Jim Moore will blow your mind as they share their step-by-step process on how they convert nearly 100% of their buyers to closed transactions. This session will redefine for you the “future state” of how an LO and Real Estate Agent will perform in the marketplace. This fresh and proven plan will change your partnerships forever.

Marty gets 100% of Jim's referrals, including sellers who are buying. Jim has gone from \$8M to \$40M a year in closed transactions through partnering with Marty!

11:30 AM - 12:30 PM

Game Changers Power Shots Panel: Building Referral Partnerships

Three top originators will share with you in individual 15-minute Power Shots, the key game changing strategies they are deploying every day to stay a step ahead of the competition. Topics to include:

Turn Your Referral Partners from Casual To Committed Relationships - Featuring Rick Scherer

Building Realtor Relationships with Lost Leads Conversations - Featuring Jessy Printz

Maximizing Opportunity: How to Make the Most Out of Each Loan - Featuring Kory Kavanewsky

12:30 PM - 2:00 PM

I Lunch and Experience our Resource Partners



AGENDA

2:00 PM - 3:00 PM

Game Changers Power Shots: Think Differently

Building Client Wealth with Calum Ross: Does the idea of serving six and seven figure income earners seem appealing to you? Would business be more enjoyable if you added so much value that people would wait for weeks to talk and send you thank you notes when you agree to serve their referrals? Elite Originator Calum Ross will show you exactly how he has created more than \$1.8 billion of incremental net worth for his clients, making him highly sought after by Canada's highest income earners. Get ready to learn and let this energized and passionate 10+ years Sales Mastery Veteran show you how to never have to look for business again!

From Wimp to Warrior with Louise Thaxton: How long does it take to turn an average loan officer into an elite, top-producing Warrior? 52 days. Hear 3 proven tactics to win the war for success by changing your daily rituals, implementing disciplines of America's elite special operations forces, and annihilating the habits, which have held you captive for years. It's time. You were created to be a Warrior.

3:00 PM - 4:00 PM

7 Words that Will Change Your Game Forever with Sue Woodard

Words Have Power – and even the simplest of words can be game changers, altering the trajectory of your business, your relationships, and your life. Words like “help” can bring the right people and systems into your business. “Thanks” can create powerful new relationships. “Yes” can open the door to new dreams. Small words – but they are game changers.

4:00 PM - 5:00 PM

I Happy Hour with our Resource Partners

Day 3: Friday Oct. 12th

8:00 AM - 8:15 AM

I Power Shot for Health with Jonathan Roche

8:15 AM - 9:00 AM

The Mindset of Being an ELITE Producer

Todd leads a robust teaching on the three character traits of being uber successful. After coaching thousands of top producers and interviewing over 1,185 Superstars, you can model their behaviors and as a result, your life and business can be transformed.

9:00 AM - 9:30 AM

Game Changers Power Shots: Marketing That Will Never Fail

No Shiny Objects: Marketing Basics That Will Never Fail You with Karen Deis: It seems like every day, there's a new social media platform. A new phone app. An untested marketing idea. There's a lot of noise to tell you about new ways to use new products in your mortgage business. The ideas that mortgage industry icon, Karen Deis, will share are strategies that have worked for others for years and years. They are not the next shiny object. They are not rocket science. You may even think they are boring. But each one is designed to get engagement (and leads) from real estate agents and consumers—which continue to be the name of the mortgage game.

9:30 AM - 10:00 AM

Game Changers Power Shots: Achieving Personal Mastery

Becoming an ELITE Originator with Cody Hardridge: Having closed over 1,500 loans in the last 4-years, Cody will walk you through the step by step process of how he went from ordinary to extraordinary! Learn from this mega originator the power of an Elite Mindset, Skill Acquisition, Execution and Scaling to unleash your future to a possibility of serving thousands of families.

10:00 AM - 10:45 AM

I Break – Experience our Resource Partners

10:45 AM - 11:30 AM

Disruptive Conversations: The Future of Influence with Todd Duncan

There is a science to getting prospects to trust you and say YES and let you become their trusted advisor. What is that secret sauce? Todd will share the newest concepts of getting conversion to the highest level possible. Concepts like Endorsement Value, Advice Packaging, and Value Pricing plus more will unveil themselves in this game changing session.

11:30 AM - 12:30 PM

Game Changers Power Shots Panel: Moving From Price to Advice

Sales Mastery Panel/Speaker Committee Leader, Linda Davidson, hosts this panel of three Top Producers, Michael Harrington, Cory DePass, and Steve Haney with practical application of influence moving from price to advice. These top originators boast very high conversion percentages of Lead to Loan to Funding. Learn what they say! Hear them respond! See their unique positioning! Take their one-liners and dialogue and incorporate them into your conversations and gain the confidence to close!

AGENDA

12:30 PM - 2:00 PM | **Lunch and Experience our Resource Partners**

2:00 PM - 2:30 PM | **Game Changers Power Shots: Innovate**

Changing Your Mindset with Craig Sewing: Former \$100M Producer and now CEO and Host of The American Dream, Craig Sewing will teach you in this disrupted market how to gain MARKETshare by being a great MARKETer. Learn how to leverage Video, Digital and Social Media to gain Realtor relationships and Consumer Direct business.

2:30 PM - 3:00 PM | **Game Changers Power Shots: Innovate**

Re-Imagine Your Relationship with Renters, Homeowners and Referral Partners, with Ryan Grant: ELITE leader and \$150,000,000 producer, Ryan Grant, will show you his disruptive value proposition that has Renters, Homeowners and Referral Partners lining up for time with him and his team. You'll change the way you look at your role as a Mortgage Professional and create untapped opportunities in this new market. Learn steps to making a significant difference in the lives of the people you work with and change the way the game is played.

3:00 PM - 4:00 PM | **Bluefishing with Best-Selling Author Steve Sims**

The man who created Bluefish, the internationally famous company that makes once in a lifetime events happen for the rich and famous reveals to the rest of us his trade secrets for making things happen.

Steve Sims's day job is to make the impossible possible. With his help and expertise, his clients' fantasies and wildest dreams come true. Getting married in the Vatican, being serenaded by Andrea Bocelli, and connecting with powerful business moguls like Elon Musk are just a few of the many projects he has worked on. He rarely reveals how he accomplishes the feats that make his clients so happy. But now for the first time, Steve shares his practical tips, techniques, and strategies to help Sales Mastery attendees break down any obstacle and turn their dreams into reality.

Day 4: Saturday Oct. 13th

8:00 AM - 8:15 AM | **Power Shot for Health with Jonathan Roche**

8:15 AM - 9:00 AM | **Game Changers Power Shots: Maximizing Social Media**

The Proven \$100,000 Income Recipe for Social Media with Larry Bettag: Do you want the complete recipe for \$100,000 in yearly origination income using Facebook and Social Media- at NO cost? In this fast pace and fun 45 minute segment, Larry Bettag will give you 10 Must Do Things, FB 2018 Algorithm changes you need to know and how NOT to do Social Media. Larry's proven recipe will be one you will want to take home and implement immediately! This is one you don't want to miss!

9:00 AM - 10:00 AM | **The Career of a Lifetime with Mortgage Legend Tom Ramirez (and joined by superstar Thomas Ramirez)**

Todd teams up with Superstar Tom Ramirez, as Tom shares the top 5 Game Changers he has made since first interviewed by Todd in 1992 that has allowed him become one of the most successful producers of all time- funding over 2 Billion in loans! They are then joined by Thomas Ramirez who shortly after graduating from college, followed in his father's footsteps and joined the mortgage industry. In the short three year period that Thomas has been originating, he has been named Rookie of the Year for his company, has been recognized as NAHREP's Top 250 Latino Mortgage Originators and has taken the title as Sales Manager for their Pico Rivera branch. This session will be one of the most powerful in Sales Mastery history- you can't miss it!

10:00 AM - 10:45 AM | **Break – Experience our Resource Partners**

10:45 AM - 11:30 AM | **The Decision of a Lifetime with Todd Duncan**

Todd's closing keynote always hits the mark, bringing to a strong close the life-changing week at Sales Mastery. This year Todd unpacks one skill set to unleash your purpose and help you optimize your potential! His promise to you is this session will change your life forever.



MOVE FAST / INNOVATE

A white line-art illustration of a rocket launching upwards, with three parallel lines representing its exhaust trail. The background is a dark blue sky with white stars and clouds. A dashed white line runs vertically down the left side of the page.

Grow

With Confidence

Modernize Your Marketing Without Sacrificing Compliance

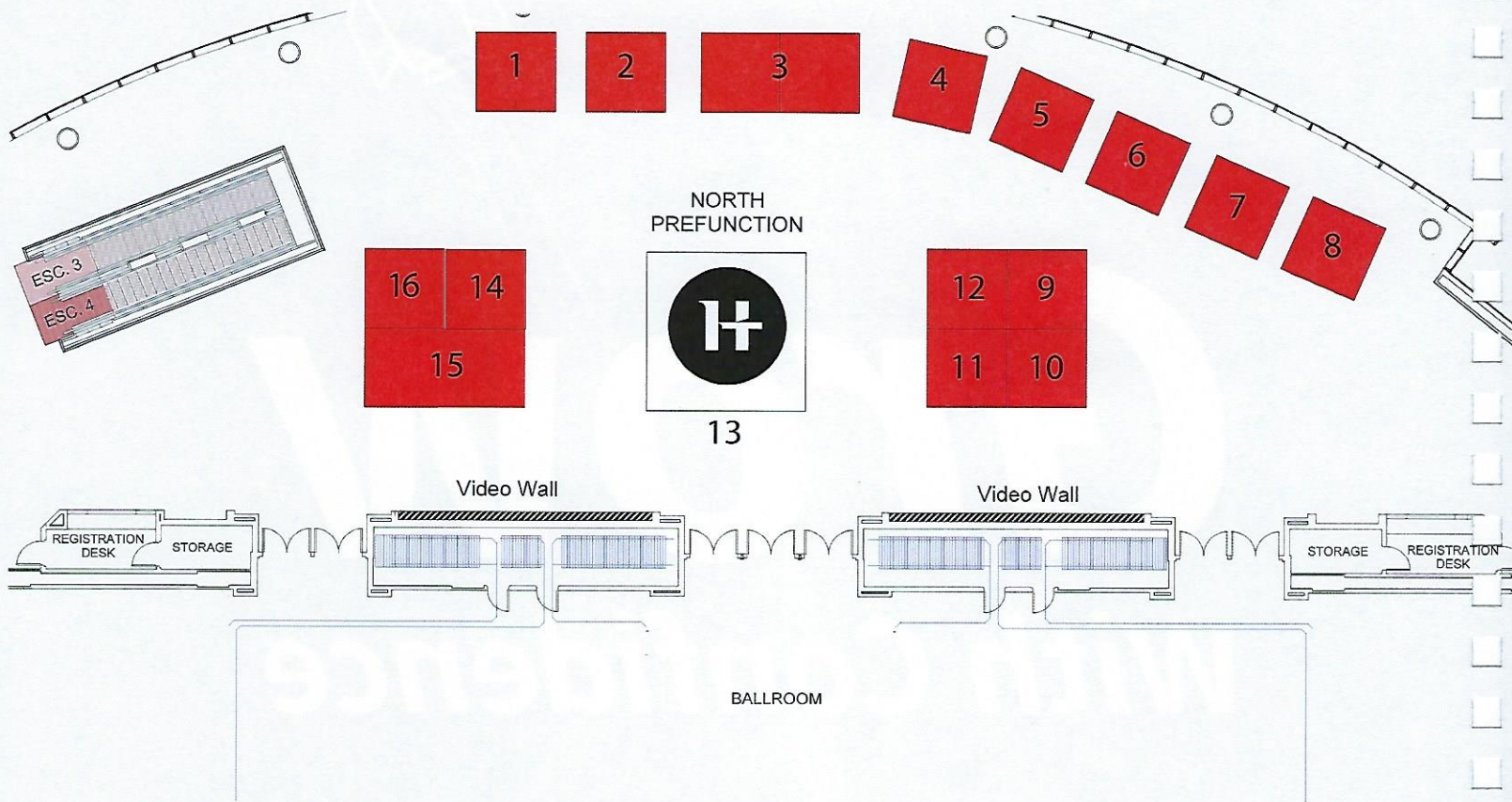
As a modern lender, you are navigating an increasingly regulated environment while keeping pace with the evolving needs – and expectations – of today’s consumers.

As the expectations of Marketing evolve and grow, it is unrealistic to expect an organization to meet these new demands using the same tools – tools that have never worked for Marketing to begin with. So, don’t.

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EXHIBIT HALL

GRAND BALLROOM FOYER



1. Mortgage Coach

2. TAYGO

3. Zillow

4. Breakthrough Health

5. Total Expert

6. FundLoans

7. Blue Water Credit

8. Civic Financial

9. BombBomb

10. Sharp Retention (Cutco)

11. HomeScout (Nexgen HBM)

12. Jungo

13. The High Trust Company

14. Whiteboard

15. High Trust Coaching

16. Social Media



Connect

When you advertise on Connect, consumers are expecting your call! This simple platform gives you the opportunity to grow your purchase pipeline by connecting with mortgage shoppers on Zillow and Trulia.



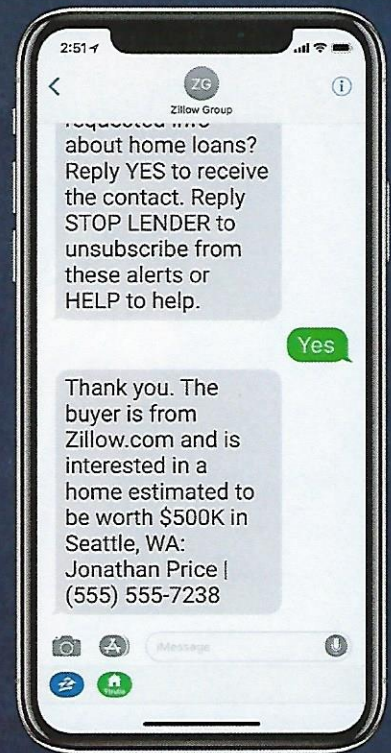
**Connect With
Potential Borrowers**



**Get Contacts
Instantly**



**We're Here
To Help**

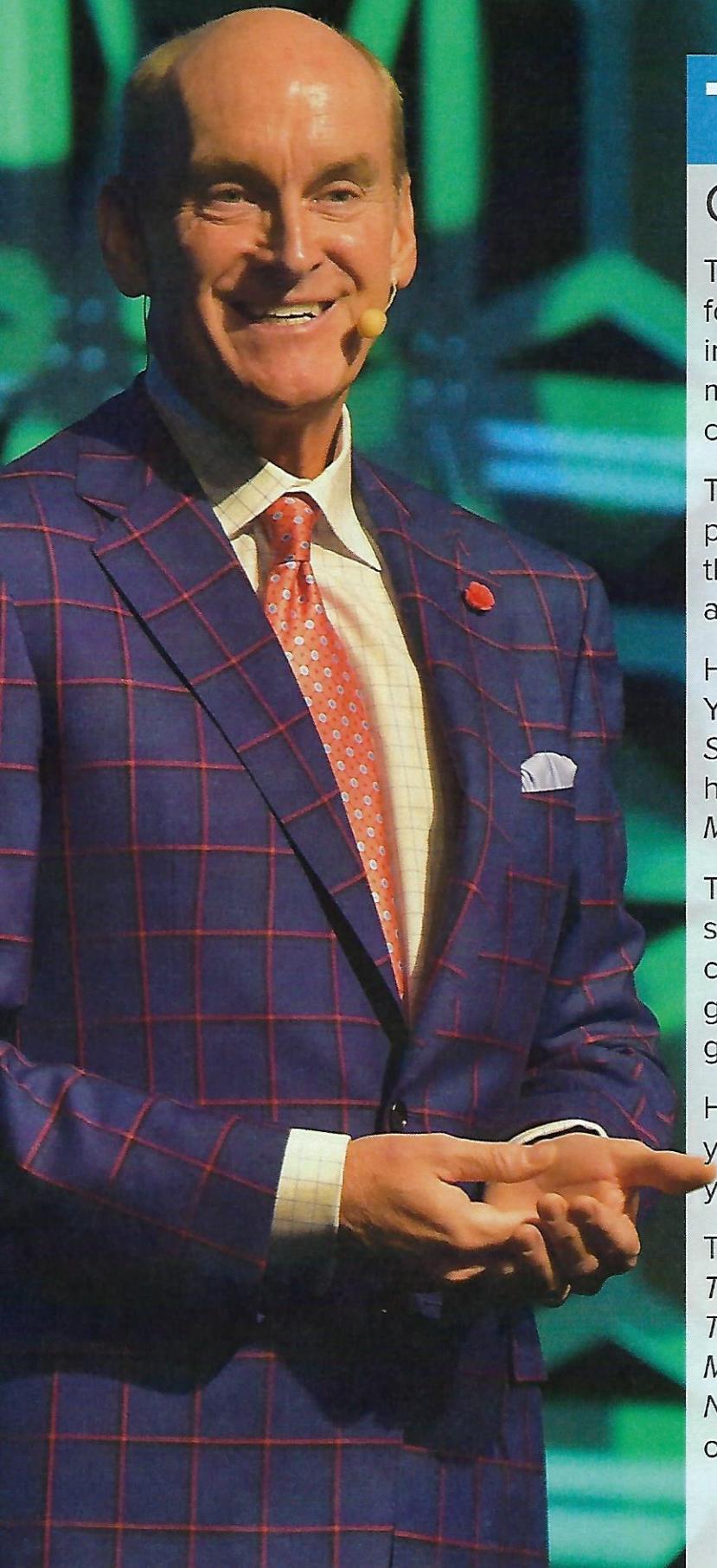


Space Is Limited

Call to find out if your market is still available:

(877) 661-3172

KEYNOTE SPEAKERS



TODD DUNCAN

CEO & CO-FOUNDER

Todd is a Sales Entrepreneur and the visionary force behind the annual Sales Mastery Event impacting over 60,000 sales professionals in mortgage and real estate and millions of their clients annually around the world.

Todd has spent his life teaching and equipping professionals with the power of high trust as the key catalyst in achieving their personal and professional dreams.

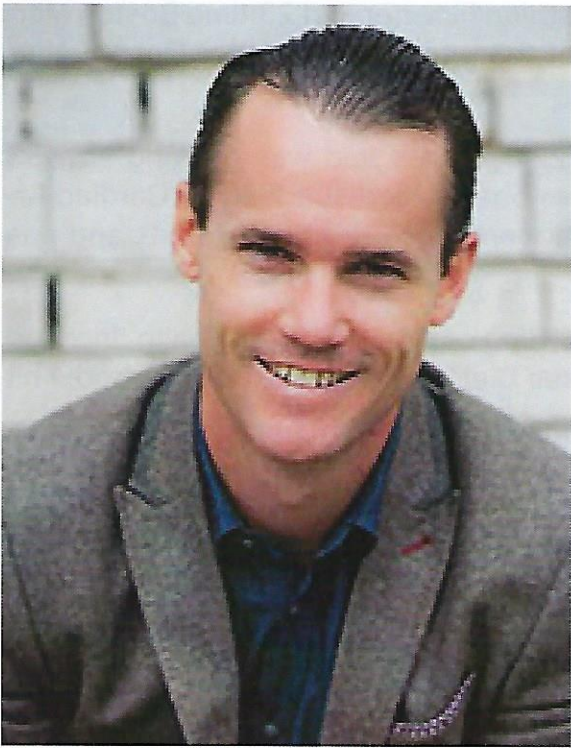
He is the author of 17 books including the New York Times Best-sellers, *Time Traps: Proven Strategies for Swamped Sales People* and his game changing *High Trust Selling: Make More Money In Less Time with Less Stress*.

Todd is a highly sought after, game changing speaker, presenting solutions for the real life challenges business professionals face daily, giving them vision, confidence and a plan to get more out of business and life!

His mantra is, trust yourself, your relationships, your faith and your future. When you do that, you set in motion a universe of possibilities.

Todd has been featured in *The New York Times*, *Wall Street Journal*, *The Los Angeles Times*, *The Seattle Times*, *Entrepreneur Magazine*, *SUCCESS Magazine*, *The Success Network*, *Dave Ramsey*, and *FOX* amongst other media sites and publications.

KEYNOTE SPEAKERS



PETER SHEAHAN

As founder and Group CEO of Karrikins Group, Peter Sheahan is known internationally as a top-rated keynote speaker, innovative business thinking and thought leadership. With staff in more than 23 cities across seven countries, he knows firsthand the challenges of growing a business in these rapidly-changing times.

Peter has advised leaders from companies as diverse as Apple, Microsoft, Hyundai, IBM, Pfizer, Wells Fargo, and Cardinal Health. He is the author of seven books, including Flip, Generation Y, Making it Happen, and the recently released Matter: Move Beyond the Competition, Create More Value, and Become the Obvious Choice.

Peter has delivered more than 2,500 presentations and keynotes to over 500,000 people in 20 different countries, and he has been named one of the 25 Most Influential Speakers in the World by the National Speakers Association,

and is the youngest person ever to be inducted into their industry Hall of Fame.



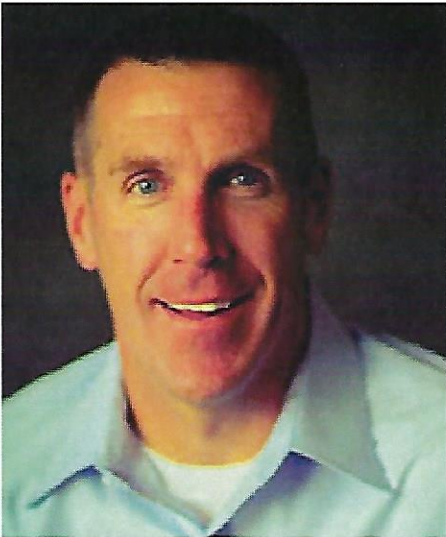
SUE WOODARD

Sue Woodard brings over 25 years of mortgage industry experience, strategic vision and leadership to her role as Chief Customer Officer at Total Expert. Her focus is on helping lenders achieve greater productivity and long-term success. Sue started her career as a processor, became a top originator, then leveraged her knowledge to become a highly acclaimed industry speaker, subject matter expert and technology executive.

In addition to having hosted a successful financial radio program and making guest appearances on CNBC, Sue has been awarded numerous industry honors, including the Mortgage Professional America HOT 100 list, the Housing Wire Vanguard

Award, and the National Mortgage Professional Most Innovative Award. She also serves on the board of HOPE4Youth, a local non-profit working to end youth homelessness.

KEYNOTE SPEAKERS



JONATHAN ROCHE

Jonathan Roche is an Award-Winning Fitness Expert, Best-Selling Author, a 12-time Ironman Triathlon Finisher and 23-time Boston Marathon Finisher (running 22 of them to raise funds for Dana-Farber Cancer Institute).

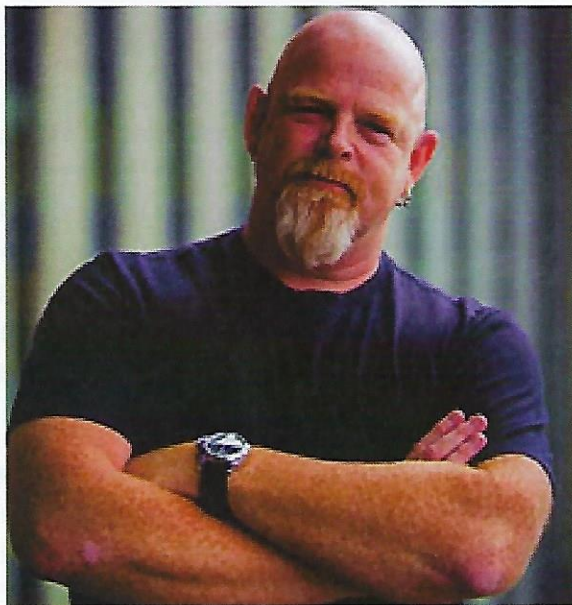
In 1995 Jonathan weighed 224 pounds and was wearing size 38 pants when his Dad (who was obese) died suddenly of Cardiac Arrest. After losing his Dad, he went on to drop 44 pounds and has kept it off for 23 years.

Jonathan is the Founder and CEO of Breakthrough Health, Inc. and his first book (“The No Excuses Diet”, which is an Anti-Diet book) hit

#3 on the Amazon Best Seller List and was featured on The Today Show. He is currently finalizing his second book titled “The 12 Laws of Permanent Weight Loss!” that will be released in January of 2019.

Jonathan started creating personalized interval training plans for people trying to get fit and lose weight in 1998. He has now been awarded two “Interval Fitness Training” patents (Patent # 7,641,592 and Patent #7,981,002) that are at the core of Breakthrough Health’s proprietary software (www.BootCampHub.com) that personalizes an individual’s interval workouts based on their health status, goals and schedule. Jonathan currently has a third patent that is pending for the “Wellness Optimization System” which is a machine learning software platform.

Breakthrough Health’s mission is to positively transform 100 million lives by 2025!



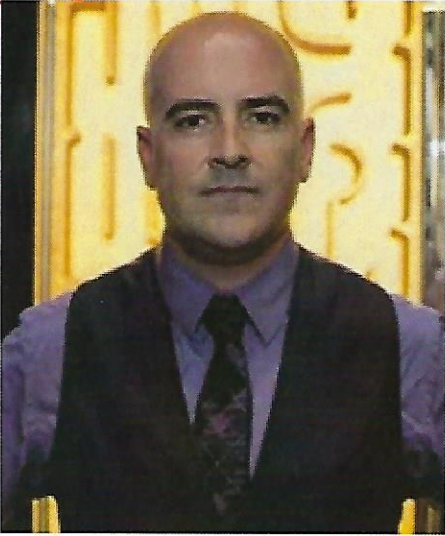
STEVE SIMS

The man who created Bluefish, the internationally famous company that makes once in a lifetime events happen for the rich and famous reveals to the rest of us his trade secrets for making things happen.

Steve Sims’s day job is to make the impossible possible. With his help and expertise, his clients’ fantasies and wildest dreams come true. Getting married in the Vatican, being serenaded by Andrea Bocelli, and connecting with powerful business moguls like Elon Musk are just a few of the many projects he has worked on. He rarely reveals how he accomplishes the feats that make his clients so happy. But now for the first time, Steve shares his practical tips, techniques, and strategies to help readers break down any obstacle and turn their dreams into reality.

The core of his philosophy focuses on simple, yet effective ways to sharpen the mind and gain practical skills that can help you learn a new perspective and accomplish anything. Whether it’s climbing Mount Everest, launching a business, or applying for a dream job, you can make incredible things happen for yourself by applying his insightful advice such as: ask why three times, never be the first call and don’t be easy to understand, be impossible to misunderstand.

KEYNOTE SPEAKERS



STEVE BROWN

Steve Brown is an energetic speaker, author, strategist, and advisor with over 30 years of experience in high tech. He is the former futurist and chief evangelist at Intel Corporation.

Speaking at events all over the world, Steve helps his audiences to understand the business and societal impacts of new technologies and how they will shape the future five, ten, and fifteen years from now.

Steve is passionate about helping people to imagine and build a better future. Whether talking about the future of work in a post-automation world, doing a deep dive on artificial intelligence, or

discussing the future of flying cars, Steve inspires his audiences to think beyond the current status quo and to reimagine their businesses, and their lives, for the better.

Steve speaks and writes in plain language on how continued advances in computing will intersect business, cultural and human trends to create both new opportunities and new challenges. His new book, *Hacking Reality*, will be published later this year. Steve has been featured on BBC, CNN, Bloomberg TV, ABC News, Wired, WSJ:Digits, CBS, and many other media outlets.

Steve works with a broad spectrum of companies from small non-profits to Fortune 100s, spanning almost every industrial sector, including manufacturing, transportation, retail, hospitality, government, education, healthcare, agriculture, media and entertainment.

Steve holds Bachelor of Science and Master of Engineering degrees in Micro-Electronic Systems Engineering from Manchester University. He was born in the U.K. and became a U.S. citizen in 2008. He lives with his wife in Portland, Oregon.



DEB DUNCAN

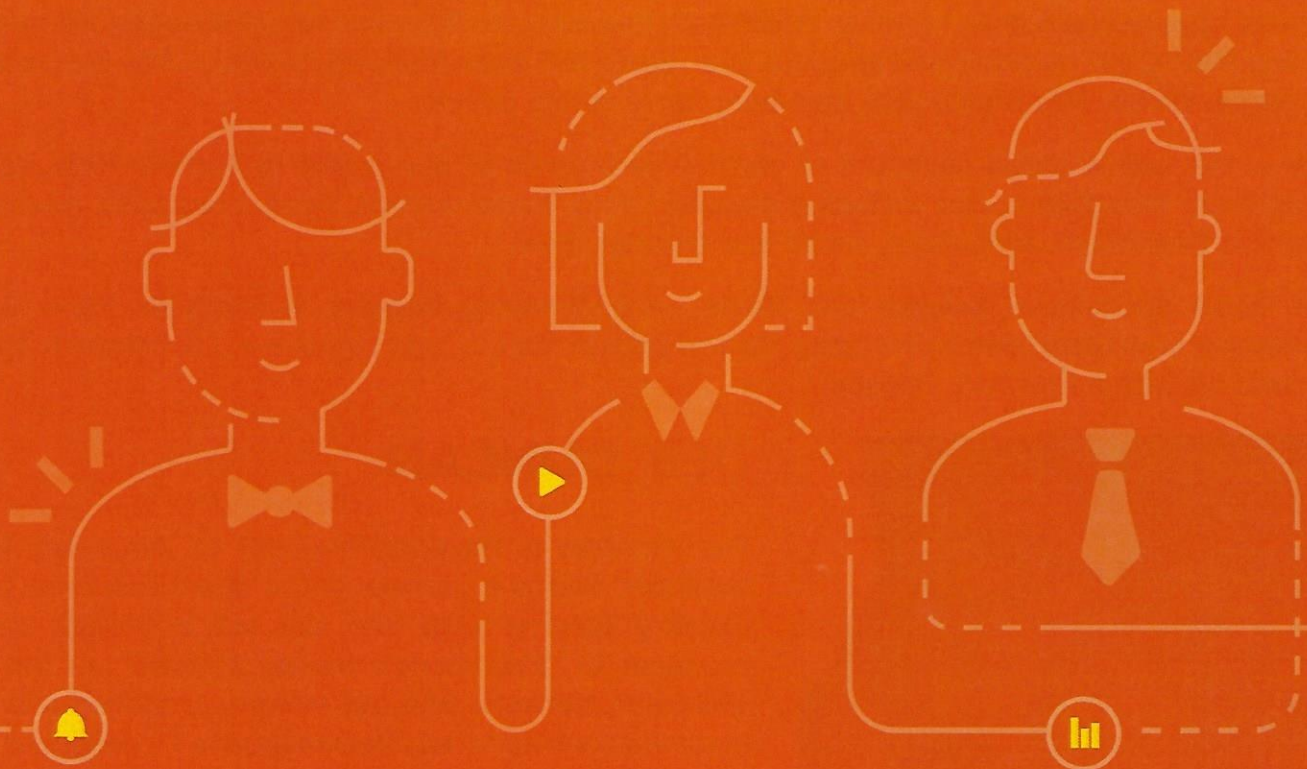
Deb Duncan is President/Founder of American Television Ventures. She is a pioneer in the direct response television industry. Starting while she was still in college she was a producer of "Everybody's Money Matters" on the Lifetime Television Network. She has written, produced and directed more than one hundred direct response TV programs. She has great insights on how to frame your message, make powerful promises and get people to respond.

Deb is an author of "5-Stars: Building High Ratings and High Trust in the Digital Age", and "The \$6,000 Egg: The 10 New Golden Rules of Customer Service" along with her fabulous husband, Todd Duncan.



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SESSION SPEAKERS



MARTY PRESTON

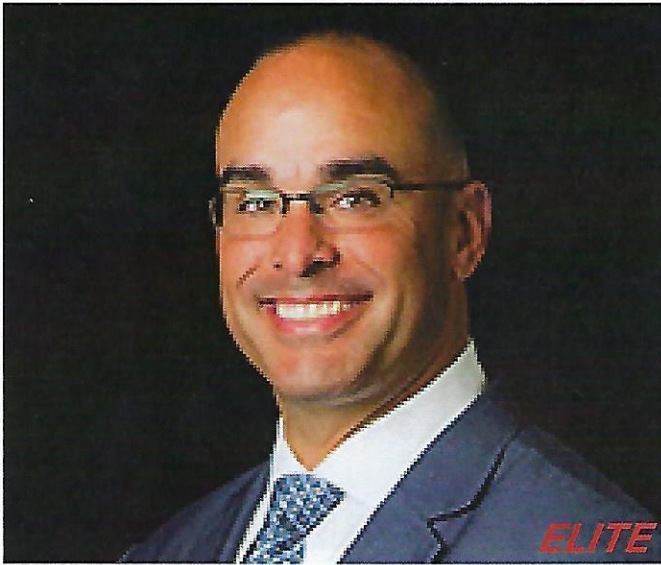
Marty Preston, Branch Manager of Benchmark Mortgage, understands the commitment it takes to be successful. He and his wife Ragan have been married for 20 years and have four amazing children. In addition to leading personal production teams which produce \$80M per year, he manages over 30 team members across 4 offices, and coaches several other managers and mortgage planners nationwide. The average production for Planners in Marty's office is 11.5 units per month which is also the exact average of the number of years they have been together. In addition to personal and branch production, last year Marty worked with a team of designers to develop a High Trust Borrower Consultation, an automated customer service experience, and a workbook for mortgage planners and real estate agents. He has a strong desire to improve both the image and operation of the mortgage industry and strongly feels that high-tech can only assist but never replace high-trust when it comes to financial decisions.



RYAN GRANT

Ryan Grant has worked in the mortgage industry for 13 years and has been ranked amongst the top 50 Mortgage Consultants in America each year since 2013. In those 13 years, Ryan has owned his own mortgage company, was Director of Retail Sales for a Mortgage Bank, been a Branch Manager, Sales Manager, as well as a Mortgage Consultant. His experience in these different positions has given him an invaluable insight into the real estate and mortgage industry and taught him how to provide the best possible service to his clients. Ryan is a Nationally recognized Coach/Speaker/Trainer, not only in the mortgage business but to all areas of real estate and finance. Ryan enjoys teaching people how to perform at their best and how to implement practices in their business to deliver a higher level of value to their clients. As a speaker, Ryan shares his passion with others to help them grow their business while enjoying a proper work-life balance. He teaches everything from his Nationally Recognized 5-Star Customer Experience to Social Media strategies and Increasing Client Retention and Referral Business. Ryan takes significant pride in his team. His team allows him to deliver a consistently amazing experience to his clients and business partners and they've grown to be one of the pre-eminent lending teams in the country. Due to his experience and knowledge in team building, Ryan trains lenders and realtors on how to grow teams and manage a highly productive staff, allowing for a growth scale that is not possible as a single person. Ryan also enjoys working with his clients on real estate planning and strategic asset management, to ensure they capitalize on all real estate investment opportunities. Ryan's mission is to provide his clients and business partners with a More Educated, More Motivated, More Confident Home Buying Experience.

SESSION SPEAKERS



CODY HARDRIDGE

Cody Hardridge is a top producing loan originator with Cornerstone Home Lending. Since attending Sales Mastery for the first time in 2011, Cody has methodically built one of the top purchase money businesses in his market. The key to his success has been the consistent, systematic implementation of the methodology taught at Sales Mastery and High Trust Sales Academy. Since 2013, Cody has been recognized by The Scotsman's Guide as one of the Top Originators in The United States.



LINDA DAVIDSON

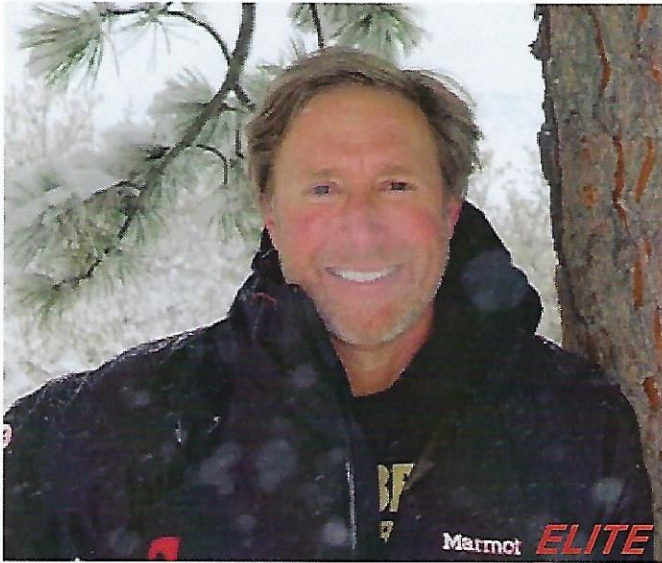
Linda Davidson, Branch Manager/ Sr Residential Mortgage Loan Originator began her career in 1997. Growing up in government housing, Linda first hand understands how blessed that she is to create homeownership for hundreds of families. In addition to her extensive knowledge of FHA, she is an expert and "Go To" person for USDA, VA and Conventional financing.

Her proven systems and mentoring has increased her and the branch Loan Officers' production year after year and it is exciting for her to facilitate an environment of growth for others. Linda also serves on the coaching/faculty staff of The Duncan Group/High Trust and heads up the speakers/panel committee for Sales Mastery. Linda continues to be included in the yearly DMagazine Best Mortgage Professional list for multiple years, has been voted best Mortgage Team (by readers of a local newspaper) for the past 20 years and was honored by Mortgage Professional America to be among 50 Women Who've Made Their Mark On The Industry.

Interesting details about Linda that most people don't know is that she is a licensed minister, she used to direct a 100 voice choir and her first job at age 16 was selling Avon products door to door. Linda credits her faith and perseverance to valuable lessons that she learned from her mother. Married to her husband, David, she is the proud mother of four sons, and grandmother of nine.



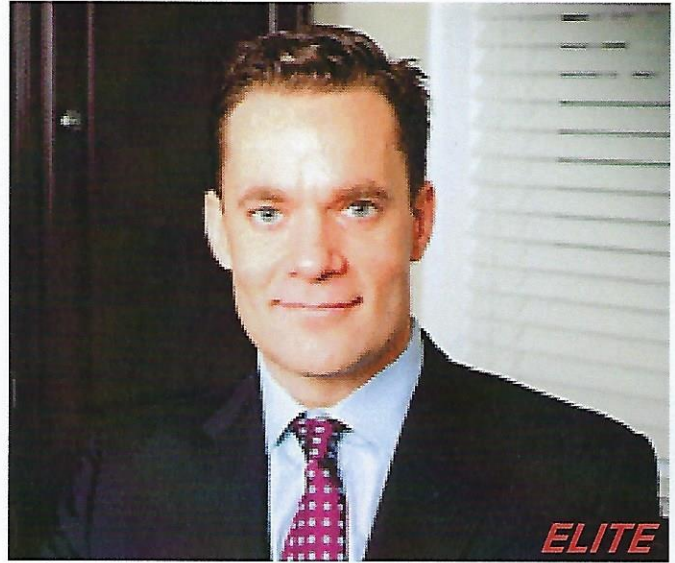
SESSION SPEAKERS



TIM BROADHURST

Tim Broadhurst, National Director of Loan Officer Development for Cherry Creek Mortgage Corporation, knows what it means to deliver excellence in every area of his life. Tim was a consistent top producer and one of the country's premier mortgage lenders for over twenty years before transitioning from personal production to investing his time, talent and energy into equipping and developing top loan officers and their teams at Cherry Creek Mortgage. Tim is also a nationally known speaker, major force in the mortgage banking scene and is considered to be one of the top thought leaders in our industry.

Even with his successful career and the many demands on his time, there is no doubt about what comes first in Tim Broadhurst's life: it is his commitment to faith and family. Spending time in these areas is definitely his top priority and favorite pastime. Tim and his four children live, worship and serve in Highlands Ranch, Colorado where they enjoy an outdoor adventure lifestyle together. He was the President, Men's Team Captain and record holder of a National Championship Water Ski Team, is a private pilot, an avid scuba diver, snow and water skier, mountain biker, traveler and overall adventurer.



CALUM ROSS

Scottish born, American trained Canadian – one of the world's top leverage wealth experts. In 2014 and 2016 Calum Ross won Canadian Broker of the Year, as well as the 2014 National Top Customer Service Award at the Canadian Mortgage Awards. Over his 15 plus years in mortgage banking and wealth management he has funded over \$2.5 billion dollars of mortgages – creating over \$1.5 billion dollars of incremental net worth for his clients.

Calum Ross is a ten-year veteran of Todd's High Trust Sales Academy as well a regular attendee of Sales Mastery. Calum is an active member of Todd Duncan's ELITE coaching platform and is certified as one of his Elite Speakers. Investing in professional development has been a huge part of his success – spending an average of over \$50,000 annually on personal improvement.

Calum is regularly featured in the media as a mortgage expert including dozens of national TV appearance and he is regularly quoted in both of Canada's national newspapers. He holds an MBA in finance from the Schulich School of Business (one of the worlds top non-US MBA programs). He is also an alumnus of Harvard Business School. Calum is an avid fitness and martial arts enthusiast and holds a black belt in Shotokan Karate. Far most important than wealth management or mortgage banking - Calum's greatest passion in the world is being a great father to his 10 and 14-year-old daughters – Abigail and Alexis.

SESSION SPEAKERS



BRIAN BOMAR

One of the youngest executives in the mortgage industry, Brian has built a region that leads the nation in both loan officer productivity and loan officer retention. As a former \$100M producer, he now prides himself in helping both young and seasoned loan originators become Top Producers in their local markets. Brian attributes the core focus of his business to a relentless focus on operational excellence, sales discipline, and recruiting world-class talent at every level of the organization.



JIM MOORE

Jim Moore is a professional Real Estate Adviser, who works extensively with families interested in purchasing or marketing existing homes and also specializes in relocation services and new construction. Jim has been a Realtor in the Lexington Bluegrass Area since 2005 and has led his real estate team to the top production volume in Fayette and surrounding counties in 2013, 2014, and 2015. Jim Moore worked as a Regional Sales Manager for NEC America's Wireless division for 12 years and later as Director of Sales for Siemens Corporation for its Cellular Division. He was the top selling agent and the Sales Director for Jimmy Nash Homes for nearly 10 years total.

Jim founded The Moore Group in 2011 after six years as a single agent and brought the team to Keller Williams in 2012. Jim credits his success with the Moore Group to the leadership and problem-solving skills developed over his years in sales. Problems will occur, he said, perceive them as opportunities and stepping stones instead of setbacks.

Jim and his wife, Tracey, enjoy working together running their own company, Orlando Vacation Retreats, which is a vacation home booking company with properties in the Disney and panhandle areas of Florida. Their Jimmy Nash home, a ranch built with tropical influences, expresses his joy of the coast. Besides working together, Jim and Tracey's greatest joy is spending time with their two sons Tristan and Mark, who reside in Miami, Florida.





RICK SCHERER

Rick entered the mortgage business a few months before graduating college in 2002. Since that time Rick has funded more than 1.2B in mortgage volume and consistently ranked in the top 1% of loan officers nationally. As a producing branch manager, coach and speaker, he contributes his success to always learning from people doing it better than himself and looking to his mentors like Todd Duncan and Dave Savage.

Rick prides himself with helping clients formulate winning strategies in their pursuit of homeownership. He believes in setting the bar high with a commitment to every client that they receive a 5-star customer service experience. Rick takes pride in laying out the road map to every client so that they understand the experience they are about to embark, on focusing on his commitment to the client as well as their commitment to the process. It's a winning formula to a happy client. Rick contributes his lead generation to the work that he does with his referral partners. The systems that he has put into place allows him to bulletproof his relationship with them by adding transformational value so they will do more business and in return provides new opportunities for him.

In addition to his work at MSA Mortgage, Rick is a regular contributor of the national TV show The American Dream, and has been selected, two years running, as The "Who's Who" of Real Estate in the Boston Market. Rick loves to connect with other people in the industry!



JESSY PRINTZ

Jessy Printz is a professional mortgage strategist who seeks to provide financing solutions that best meet the needs of each individual client through a highly personalized and five-star experience – "The Royal Client Experience." She is committed to enhancing clients' lives and finances through the mortgage process and creating sustainable, exponential business growth for her partners through consistent, intentional, and valuable communication inside their shared ecosystem of referral sources.

As a proud member of Rotary International and founder of the Pawsitive Vibes Project, Jessy is passionate about her community and animal-positive causes. She and her husband Matt are adoring parents to their beautiful daughter, Coral, and four rescue pups.

SESSION SPEAKERS



KORY KAVANEWSKY

Kory Kavanewsky is a Producing Branch Manager in Coronado, CA. He entered the Mortgage Industry in 2002 and was quickly noted as "One of 40 under 40 professionals to watch" by National Mortgage Professionals Magazine. Kory is passionate about systems and using them to guide people through the homebuying process with ease. His mantra is "every customer, every time, no exceptions, no excuses" and he reminds his team of that every day. He thoroughly enjoys teaching and motivating his team members, business partners and others in the mortgage industry.

The Scotsman Guide has ranked Kory as a top loan volume producer and top VA loan volume producer for the past 6 years. He is known as a trusted advisor in his community and has built a database that is loaded with repeat clients and high trust business partners.

Kory was born and raised in Coronado and currently resides there with his wife and two boys. He enjoys hanging at the beach with his family, swimming, and traveling.



LOUISE THAXTON

Louise Thaxton is a producing branch manager with Fairway Independent Mortgage Corporation for 18 years and has been in the mortgage business for 21 years. Also, as the founder and director of the American Warrior Initiative, the non-profit of Fairway, she travels the United States bringing awareness to real estate and mortgage professionals of the challenges facing military service members when they return from war and helping to bridge the gap between American civilians and the warriors who protect them. She has taken this message to over 25,000 real estate agents in 32 states in the last 5 years.





KAREN DEIS

Karen started her mortgage career on April Fool's Day, 1972. During her mortgage career, she was a closing agent, loan officer and branch manager. In 1990, she started an all-women mortgage company, which became a one-stop shop for her clients. She also owned a real estate company, an appraisal company, and also co-owned a mortgage company with a large tract builder. In 2000 she sold all of her companies to provide on-line seminars, ezines and sales and marketing products that get engagement and generate leads for loan originators. Her websites include: LoanOfficerMagazine.com and MortgageGirlfiends.com



MICHAEL HARRINGTON

Michael Harrington with PrimeLending has been a loan officer since 1996. His tag line is "Putting Your Family First in Finance" which has much to do with the 4 lovely children he has with his wife of 17 years, and his belief that every family should have a home of their own. His top ten realtors have been with him for an average of 9 years and he's been in the top 1% of loan officers for the past 5 years. He has credited his business model to listening to Todd Duncan, Dave Savage, Tim Broadhurst, and Brian Buffini for the past 22 years. In his spare time he plays drums for his church, flies airplanes, and helping with his children's activities.

SESSION SPEAKERS



CORY DEPASS

Cory DePass has been working in the Mortgage industry since 2004 but has specialized in purchase loans since 2011. Cory has always been a top performer in all mortgage related endeavors he's engaged in and has been in the top 10 self-generated purchase lenders in Orange County for the past 5 years. Since 2011, Cory's production has increased 400% with little to no marketing dollars spent. He believes this is due to his extremely high standard of customer service and consistency in his product. His client's needs are his top priority and he prides himself on customer service and maintaining a long list of "client's for life". Cory's primary goal is a seamless and totally transparent lending experience.

Cory is not only a Top Producer in his company but also manages and leads on of the top producing branches at Benchmark Mortgage. His systems have proven to increase his branch Loan Officers' production, as well as his own, year after year and it is exciting for him to facilitate an environment of growth for others.

Outside of work, Cory is a husband, father and an active member of the community. He is on the board of a non-profit organization called "California Youth Services" which is an early intervention program for at-risk teens. His favorite thing to do outside of the office is spend time with his wife and 2 year old son, Hunter.



STEVE HANEY

Steve Haney is known as The Mortgage Doctor. He is an expert in the field of mortgage lending and is the go to guy in Colorado. He has often been described as a true professional, a man of integrity and someone who always does the right things for the right reasons. Steve is also a regular guest speaker on several local radio shows and is endorsed by the Consumer Advocate.

A lot of people may think that Steve is just in the business of loaning money, but he doesn't see it that way. He is helping his clients to create the largest single debt that most of them will ever have in their lives. He feels both a professional and moral obligation to help them manage that debt to fit into their short and long term investment goals. As a result, he takes a financial planning approach to the mortgage business.

While he is an expert on all types of loans, his passion is for the Reverse Mortgage Program, because of what it can do to help seniors and their families. Because of his expertise in this unique area of banking, many banks refer their reverse mortgage clients to him. He is recognized as an expert and sought after by financial planners and seniors from all over the country to help solve their needs.

Steve earned a business degree at Brigham Young University. He has four adult sons, two of whom have served in the military. He believes strongly that America can be strengthened by returning to core Christian values and by strengthening families. He loves fishing, hunting, camping and helping young men by working with the Boy Scouts of America.



SESSION SPEAKERS

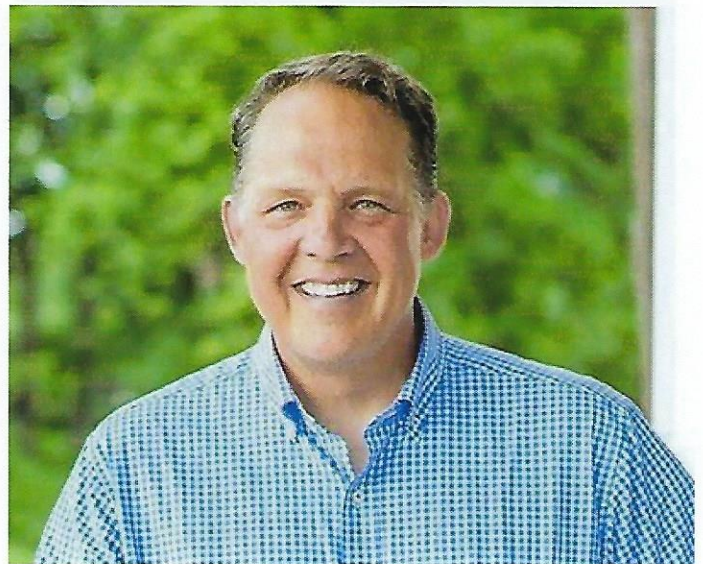


CRAIG SEWING

We know him as the CEO of Ignite Now Media, but Craig Sewing a former 100M Procuer is better known to his audiences as the creator and TV host of 'The American Dream.' Born and raised in the Midwest, he has quickly established himself as a television and radio personality who's eager to go to bat for his audiences and tackle polarizing issues head-on.

The motto of his talk show is "Educate, Empower and Engage with his viewers on topics related to the American dream" and he does so by going against the grain of the negative media, and instead offering concrete and constructive advice to his viewers on issues that matter most to them.

With his strong background in real estate, finance, and entrepreneurship, Craig has succeeded in leveraging his extensive network of contacts to pioneer this year's nationwide launch of 'The American Dream'. Equal parts edgy and approachable, Craig has established himself as a leader among elite entrepreneurs, appearing regularly at speaking events and fundraisers alike. His passion for his country runs deep, and so does his love for his audience.



LARRY BETTAG

Starting as a loan officer in 1994, Larry has funded over ¾ of a billion dollars of mortgages as a Mortgage Professional. Originally from Saint Charles, Illinois, Larry holds a Bachelor's in Literature and Communication from Benedictine University; a Master's in Clinical Psychology from Roosevelt University and a Doctor of Jurisprudence (Law Degree) from Northern Illinois University School of Law. Understanding and leveraging the power of social media, he averages a minimum of one mortgage per week as a result of Facebook and has built numerous realtor relationships from his posts and blogging.

Married to the most awesome woman ever, Michelle since 1997, Larry has 5 awesome kids-Brett, 19, Jake 17, Claire, 15, Grant, 13 and Tessa, 11. He loves rock climbing and hiking in the Rockies, adventure fishing in northern Canada in the Arctic, running, cigars, and grilling. Larry is a former professional disc golf player and to him, his faith and family are most important.

SESSION SPEAKERS



TOM RAMIREZ

For the last 30 years, Tom Ramirez has been one of the most influential mortgage originators in our industry. With over a lifetime of 250,000 loans funded and nearly 3 billion in dollars funded, it is safe to say that Tom's work ethic and dedication to his community has been the standard for all mortgage originators to follow.

Beginning with his father, who was a real estate broker, Tom understood that being a great lender was one of the most important parts in a great real estate team.

Tom's focus on finding Hispanic families their first home has been his vocation. Using his knowledge of the industry, Tom has pioneered and utilized first time home buyer programs to help get families into their first home.

For many mortgage originators this industry becomes a career job or something they fall into. For Tom, it has always been more than that. For Tom, this industry has always and shall continue to be a vocation. A vocation to help the underserved communities and borrowers. Because of this Tom has received recognition and is honored as being one of NAHREP's Top 250 Latino Mortgage Originators in the nation as he placed #2 in 2017 and #10 in 2016.



THOMAS RAMIREZ

Shortly after graduating from college, Thomas Ramirez followed in his father's footsteps and joined the mortgage industry as a loan originator. In the short three year period that he has been originating he has been named Rookie of the Year for his company, has been recognized as NAHREP's Top 250 Latino Mortgage Originators, and has taken the title as Sales Manager for their Pico Rivera branch. Recently, Thomas has taken some time to focus on his health and has lost over 100 pounds since the beginning of the year.



SESSION SPEAKERS



BECKY WALTERS

Becky is a 36-year seasoned mortgage professional and a producing manager as SVP/Area Sales Manager for LegacyTexas Bank as well as leads a top producing sales team. Becky is a valued member of the High Trust ecosystem since 2004, a High Trust Academy Graduate, has attended Sales Mastery since 2005, and an 5-Star Mortgage Professional. She has achieved Best Mortgage Professional status for D Magazine in her market for 5 years running, and has continued to be a top producer in her market for the past 30 years.



MIKE "MUDDY" SCHLEGEL

Mike Schlegel, who usually just goes by his Indian Princess name, "Muddy," lives in Raleigh, North Carolina with his wife and three daughters. Muddy had a distinguished, 20-year professional career in watershed management, where he specialized in facilitating collaboration and helping diverse stakeholders find agreement to complex regional issues, having been recognized with multiple awards for facilitation and innovation.

Muddy co-founded the Whiteboard Academy in 2016 to take his facilitation and visual superpowers to a broader set of clients and topics, and now he is on a mission to help others unlock awesome through visual thinking.

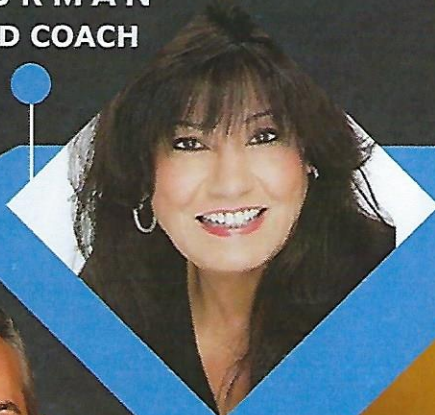
He works with leaders and teams around the world in the real estate, health care and technology sectors to help them transform their business results through creativity and innovation, increase employee and client engagement and supercharge collaboration.

The Whiteboard Academy also provides Visual Facilitation Training to help rising leaders unlock awesome at work and master the skills of visual learning as a powerful tool for critical thinking, problem solving and strategic planning.

We are very excited to have Muddy and the Whiteboard Academy here with us at Sales Mastery 2018 to create real-time visual summaries and help us unlock awesome! Be sure to connect with Muddy, and please share photos of the visual summaries to inspire your followers and professional network.

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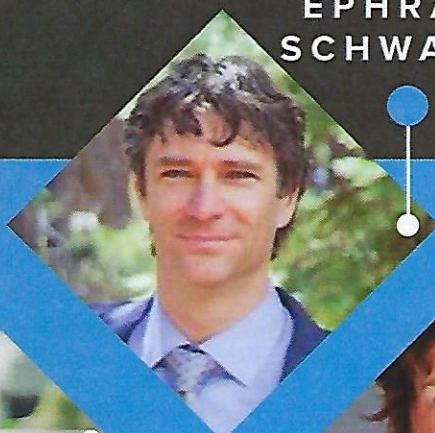


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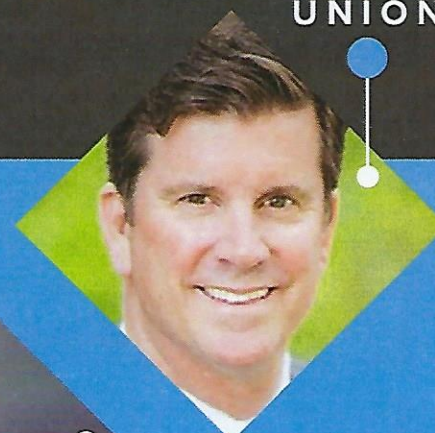


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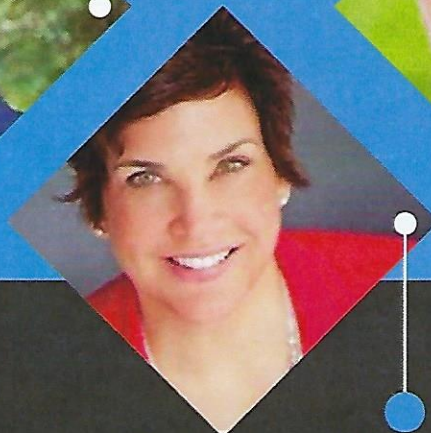
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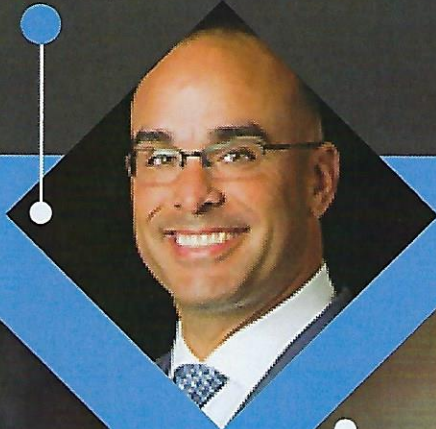


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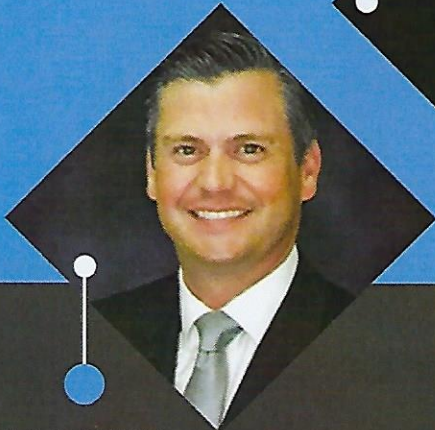


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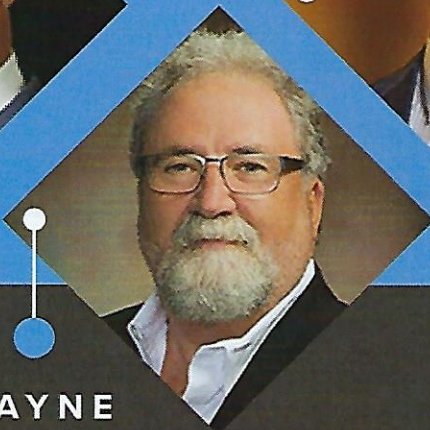
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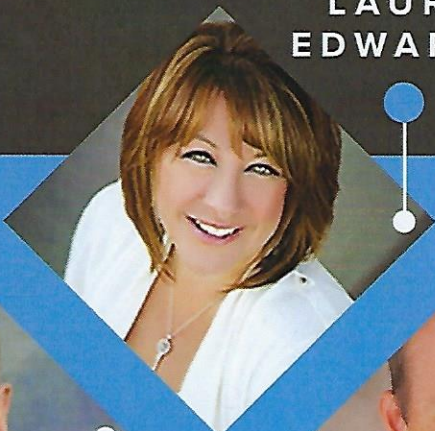
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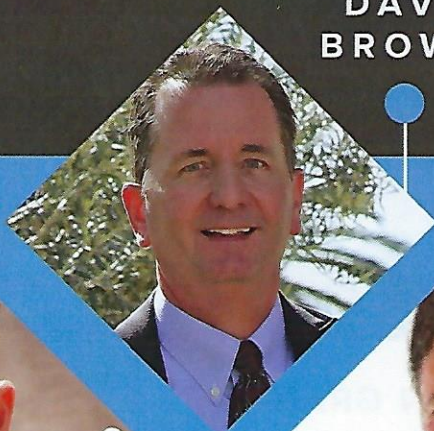
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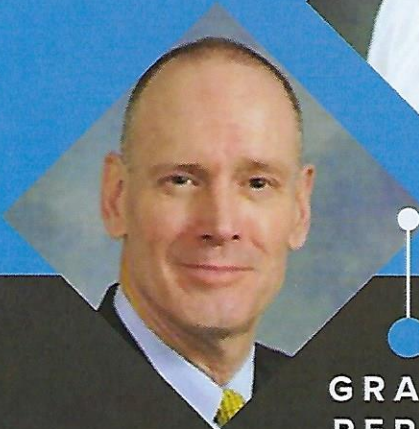
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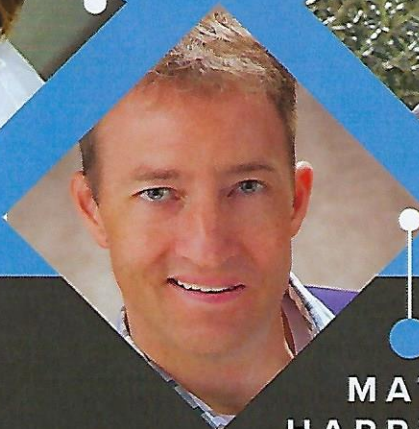
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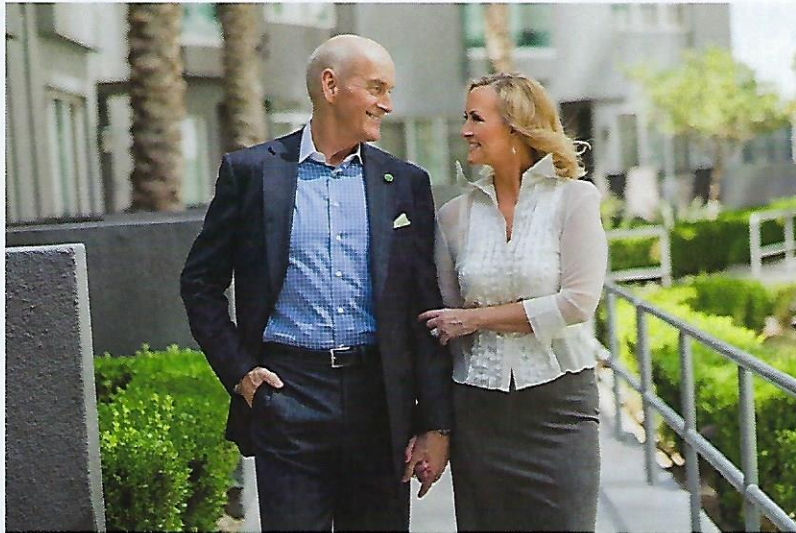


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Total Expert is a software-as-a-service (SaaS) company that provides the first modern, web-based, enterprise-level marketing and sales software solution built specifically for mortgage and financial services. Eight of the top 15 mortgage lenders in the country use Total Expert. Total Expert ensures that marketing, compliance, and sales are aligned in a single system of record, and provides tools

including marketing, co-marketing and CRM. Every marketing asset ever created, downloaded, or deployed is tracked with on-demand audit level reporting. The highly flexible, profile-based architecture provides precise permission controls and hierarchy settings for endless custom reporting and analytics options based on the unique preferences of the organization. For more information, visit totalexpert.com.



Zillow Group houses a portfolio of the largest and most vibrant real estate and home-related brands on the web and mobile.

The company's brands focus on all stages of the home lifecycle: renting, buying, selling, financing and home improvement. Zillow Group is committed to empowering consumers with unparalleled data, inspiration and knowledge around homes, and connecting them with the right local professionals to help. In addition, Zillow Group develops a comprehensive suite of advertising, marketing software and technology solutions to help real estate, rental and mortgage professionals maximize business opportunities and connect with millions of consumers.



SHARP
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LONG-TERM BRANDING TOOLS

How do you strategically appreciate your clients? Sharp Retention provides a system and branding tool that creates lasting impressions with every client. As Darren Hardy said, we "cut through the noise" giving a non-consumable, high-quality useful item - a Cutco knife engraved with your logo, name, and number that your client uses daily in their kitchen.

We currently serve over 10,000 Realtors and Lenders across North America, creating forever branding with every closing and referral gift. Sharp Retention offers the ONLY system in place which keeps your name & brand top-of-mind 365 days a year forever, giving you the most productive "cost-per-touch" branding tool on the planet.



We Are Credit Experts! Your credit score is the most important three-digit number in your life. Improving your credit can lead to savings of hundreds of thousands of dollars over the life of a mortgage. In addition, a better credit profile can help you with credit card rates, auto loans, and help you get that job you wanted.

Sometimes, though, life can get a little out of hand and you may fall behind in bills, run up a lot of debt or make other mistakes that can ruin your credit score. A bad credit report will raise your interest rates and make it even more difficult to catch up. That is where we come in.

We offer credit and financial consulting and work to improve your overall credit profile, so you can recover and save thousands to hundreds of thousands on your mortgage, credit cards and more.

Our clients have the opportunity to save hundreds of thousands on their mortgage, credit card bills or even their car insurance. Call us at (916) 315-9190 for a free consultation...you have nothing to lose!

FUNDLOANS
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FundLoans is the premier Jumbo - Super Jumbo Non-QM Mortgage Lender. With over 5 years in the Non-QM space, FundLoans takes a "Make-Sense" lending approach to your borrower's scenario. We don't underwrite like a bank, we underwrite like a private FUND. If your borrowers have compensating factors or can demonstrate the

ability to pay in an unconventional way, FundLoans may still be able to approve your loan.



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Nexgen-HBM, is a full-service business development and technology company on a mission to create business at the intersection of real estate, lending, technology and people. We are thought leaders in the development of real estate search and lender-centric business technologies that provides lead and conversion solutions, enabling lenders and agents to capture and retain buyers prior to making a purchase decision.

Our proprietary national MLS, HomeScout®, has created a disruptive trend in the lending and real estate industries. HomeScout is the only nationwide search site with 100% MLS listings that connects consumers with a digital real estate marketplace, while providing lenders and agents with business intelligence to better serve their clients.

With HomeScout, buyers can research the most accurate and up-to-date data available, in a private and secure environment where their personal information is never at risk, and helps lenders build a pipeline for future business by keeping buyers off public sites. Our lender customers receive real-time reporting from HomeScout's proprietary CRM, the HBM Dash®, to efficiently increase lead conversion rates and mortgage origination volume.



Your emails and texts lack personality, differentiation, and clarity, but you rely on them to grow your business. Connect and communicate more effectively by easily adding video to your messages. Record and send with devices you already own. You're in sales because you're better in person. But the most common forms of communication fail to capitalize on your best asset ... you! Put your face, voice, personality, expertise, and nonverbal communication back into your messages. Record and send simple videos with your webcam, smartphone, or tablet. From your office, your home, your

car (while parked!), or anywhere else you are. It's not a production - it's a voicemail that's far more complete and human. It's you!

BombBomb makes it easy to use simple videos to build relationships - through email, text, and social media. We help you get face to face with more people more often.

We specialize in real estate, mortgage, and title. We're working with sales professionals like you in all 50 states and several countries around the world. We know what they're doing. We know what works. We're here to help you build relationships and grow your business.



FundLoans is the premier Jumbo - Super Jumbo Non-QM Mortgage Lender. With over 5 years in the Non-QM space, FundLoans takes a "Make-Sense" lending approach to your borrower's scenario. We don't underwrite like a bank, we underwrite like a private FUND. If your borrowers have compensating factors or can demonstrate the

ability to pay in an unconventional way, FundLoans may still be able to approve your loan.



Mortgage Coach is the only comprehensive borrower conversion platform that moves home loan financing from rates and price to advice. Our Total Cost Analysis (TCA) conveys complex loan options in simple, clear, concise charts and graphs for easier comparison and decision making. Through a conversation on

hopes and dreams instead of fees, closing costs and monthly payments, the mortgage professional improves lead conversion, increases overall production, and maximizes profitability. With minimal focus on rates, additional benefits for the lender include: reduced price exceptions, margin preservation and creation of client for life relationships.

Every TCA delivered to either a homebuyer or Business Referral Source prominently displays your lender branding and compliance disclosures. In addition, the interactive side-by-side loan comparisons provide every type of homebuyer a way to clearly understand the benefit of each loan option over the full life of the loan. The experience can be delivered in any medium including print, web, or on mobile devices so customers can be engaged anytime, anywhere, while easily sharing the TCA with family and friends.

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CIVIC

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Civic Financial Services is a private money lender, specializing in the financing of non-owner occupied residential investment properties. CIVIC delivers fast, honest, simple lending for real estate investors and mortgage brokers alike. With unmatched resources, such as unparalleled valuation expertise in the real estate vertical as well as access to low-cost capital, CIVIC is

able to keep all operations in-house so loans are managed more closely, quickly, and efficiently. Providing a specialized set of market competitive products, CIVIC is here to help you break through traditional lending barriers to unleash ever-increasing success.

TAYGO

Today, most customer centric industries are taking advantage of the Internet and Social Media to access more customers. Mortgage Lenders, however, are yet to tap into such enormous potential for growth. TAYGO recognized this crucial need and went out to build the first all-in-one platform to unleash the power of Digital Marketing for lenders.

jungo

Not your average CRM. Jungo's best-in-class marketing and CRM software provides mortgage professionals an all-in-one tool for business growth. Fully integrated with leading mortgage technology, Jungo helps you cultivate relationships, streamline your loan process and close more loans. Empower production today. www.ijungo.com

WHITEBOARD[®]

MORTGAGE CRM

Developed by some of the industry's top producers, Whiteboard Mortgage CRM helps mortgage professionals close more loans, create better relationships, and increase referrals by automatically staying in touch with clients and partners. Whiteboard takes

the hassle and stress out of set-up with The Mortgage Playbook™; a collection of 100+ campaigns, branded emails, call prompts with scripts and pre-determined tasks for more personal touches. Named one of the most innovative companies by HousingWire Tech100 for the past two years; we're obsessed with helping LO's and branch managers build their teams and grow their businesses. Visit www.whiteboardcrm.com to see how Whiteboard can help you grow your business.

BREAKTHROUGH™

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Breakthrough Health's patented program (www.BootCampHub.com) personalizes each member's exercise plan, nutrition plan and motivation plan to maximize every minute of their limited exercise time while incentivizing sustained engagement. Each participant uses www.BootCampHub.com to access 22 World-Class Coaches streaming 55 Live Streaming Workouts per week and to access 6,000 unique recorded workouts.

The Founder & CEO of Breakthrough Health is Award-Winning Fitness Expert, Best-Selling Author, 12-Time Ironman Triathlon Finisher and 23-time Boston Marathon Finisher Jonathan Roche who is one of the Keynote Speakers at this year's Sales Mastery (his fourth straight year speaking at Sales Mastery).

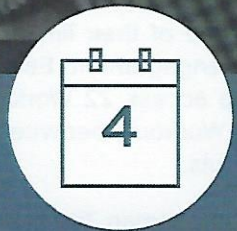
Interested in dropping 10-30 pounds by year-end (in 10 weeks)? Stop by our booth to join the Drop 30 in 10 Weight Loss Challenge!

Interested in a Corporate Wellness Program that actually works? With detailed reporting on workouts, weight loss, BMI reductions, estimated health insurance reductions and ROI per organization —there is no more guessing whether your wellness initiatives are working

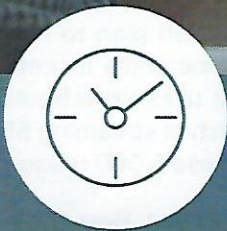
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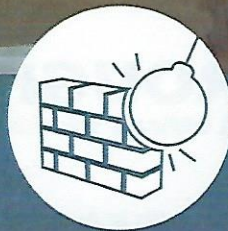
CIVIC delivers fast, honest, simple lending for real estate investors. Whether you're an experienced investor or a first-time borrower, we are here to help you break through traditional lending barriers to unleash ever-increasing success.



1,2,4 Year
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5-10 Day
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Online Application

Get your Quick Rate Quote online today at www.civicfs.com

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AGENDA

Day 1: Wednesday Oct. 10th

1:00 PM - 3:30 PM

Leadership Live!

New York Times Bestselling Author, Todd Duncan, along with futurist, author, strategic thinker, and former chief evangelist at Intel Corporation, Steve Brown, talk about the impact of AI, Blockchain, and other technology shifts occurring that will impact mortgage origination. Also, Regional President and former \$100M Top Producer, Brian Bomar and National Sales leader, Tim Broadhurst, will share insights to increasing trust as a leader, building high-performance sales teams, and creating a winning culture. Nothing is off limits to talk with these leaders about!

6:35 PM - 8:30 PM

Sales Mastery 2018 Opening Keynote with Todd Duncan

I Am Not A Robot – Todd Duncan kicks off the 26th Sales Mastery event with a gripping and compelling message on CHANGE. Stay a step ahead of the change through which the industry is going. Become your own force of change. Todd is passionately clear on what it takes to win and will share a series of six universal laws that will equip you to owning your future and win big no matter what the market conditions might throw your way!

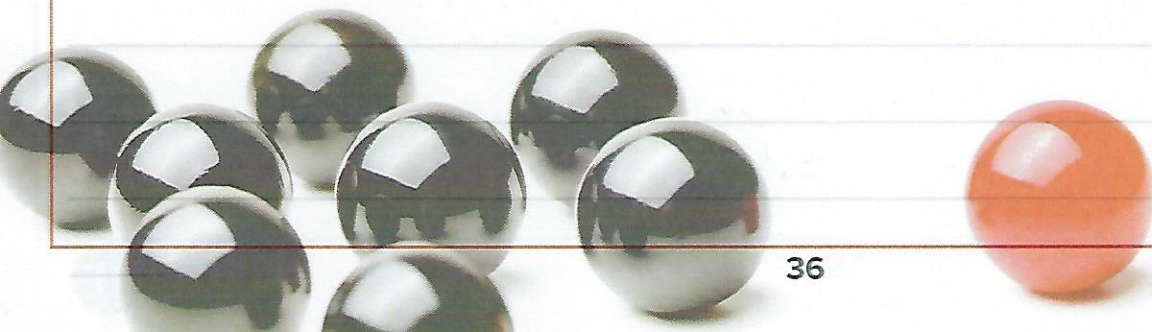
“Those who disrupt their industries change consumer behavior, alter economics, and transform lives.”

- Heather Simmons | Author | Reinventing Dell

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SALES MASTERY

TRANSFORM YOUR BUSINESS AND LIFE





BRIAN BOMAR



TIM BROADHURST

10/10 Panel

Leadership -

- open, honest, authenticity, humble
- meritocracy (not relationships necessarily) for leadership positions
- user experience - understand it. Technology...
 what's good/not/hard/easy in regards to your
 what are pain points team/staff

★ connection. Defined by connection to followers
 Don't/can't tell ppl what to do
 Add value to your team

Higher service to smaller group of people
 Give the best to the best

Find better ways of doing things + helping people
 Relationships (connecting + helping)

How to create more value for players on your team?

Modernize Leadership: How to lead millennials?
 ★ Lead from their side ★

Systemic Success - create a PROCESS that can
 be repeated over & over.
 ex. Social Media, CRM, etc.
 ex. I need another person on my team... Done



Standards of Excellence.
Love the people.
Great people are motivating.

SALES MASTERY

TRANSFORM YOUR BUSINESS AND LIFE

Examples: - min production standard - excellent customer service
- can't miss closings, ever
- can't issue bad pre-quals
if gets ~~cancelled~~ denied by U/W, look at it + find out WHY

Trust is critical. Comes from excellence!

Have a great system then lean in for great results.

Value that you deliver is key. For people you lead! NOT JUST CLIENTS

How to Win in the Market: 1. Knowledge they acquire
2. Value they deliver

How do you train excellent customer service? Hire 1 out of 50

HIRE great people... attn to detail, work ethe, social skills, etc.

SOA: "I want working for us to be an exceptional opportunity"

Standards in hiring:

non-commissioned → I hire for every 143 applicants. Online assessments, in person Hiring is full-time job. Talent Manager.
No B Players. Respect you more for having all A Back LOs w/ great sense of detail ppl. LOs can focus on relationships

Rainmakers & Juice Shakers
↑ SALES ↑ OPS

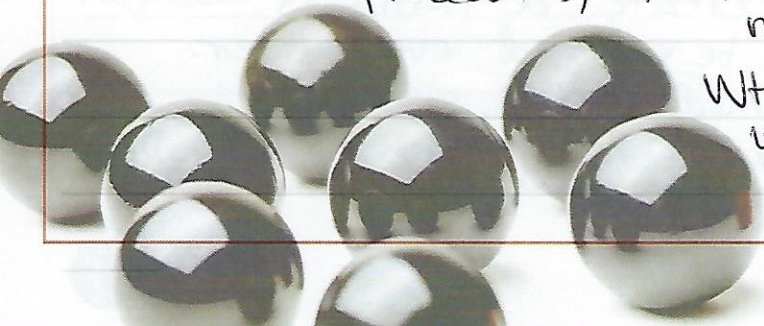
PARTNERSHIP is so imp.

Be excited about the people working for you. (EVERY ONE OF THEM) Should LOVE all of them.

Pass on the positive experiences... ex. show underwriters, processors, etc. the good experiences and put their names on it too! + vision

WHAT ARE YOUR VALUES?
what do you stand for? keep you happy?
CORE OF IT
WRITE IT DOWN

what motivates each person?



KEY TAKEAWAYS:



SIGN UP TODAY IF
YOU WANT CHANGE

Only 150 Spots Available

Retail

~~\$3,495~~

Special Event Price

\$2,495

4 DAYS THAT WILL
CHANGE YOUR
LIFE FOREVER

HIGH TRUST

A TODD DUNCAN COMPANY



S A L E S
A C A D E M Y

DECEMBER 4TH-7TH, 2018
LAS VEGAS, NEVADA

Do you need a predictable business plan for success? Looking to increase your productivity? At High Trust Sales Academy you'll learn sales confidence, business strategies, and scripting for success. Plus, strategies for effective time management, organizational, and operational excellence.

High Trust Sales Academy Guarantee:

We guarantee you'll leave with Powerful Tools and new skills to grow your business AND enjoy a more rewarding life or your money back!



RED ROCK CASION RESORT AND SPA

Red Rock Casino Resort & Spa provides the ultimate Las Vegas resort experience. This resort hotel provides an idyllic getaway just minutes from the world-renowned Las Vegas Strip. Ideally situated near the entrance to Red Rock Canyon National Recreation area, you couldn't ask for a more intimate, yet exciting place to play, both indoors and out. Adventure awaits, with miles of trails, outdoor activities, and epic mountain climbing, for those enjoying an active lifestyle. Rest and repair in our soothing spa and be ready to take on tomorrow!

DENISE DONOGHUE HTSA GRAD 2014

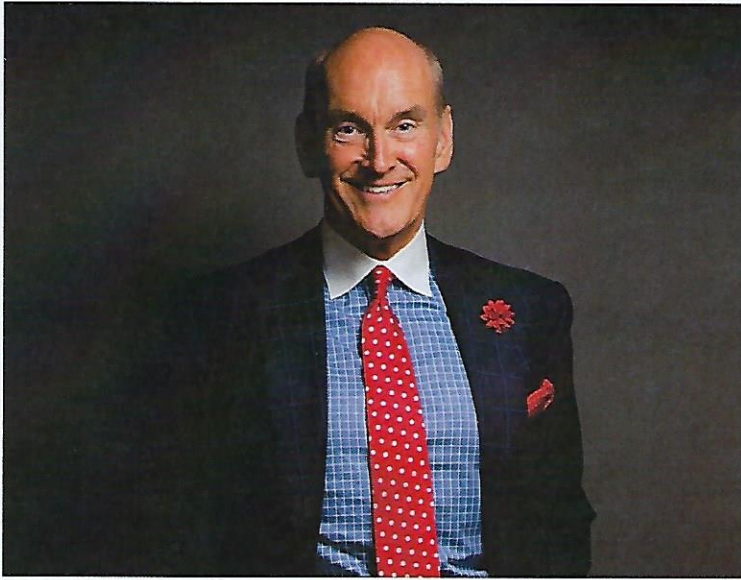
"Last year I funded 34 units for \$7.8 million in purchase loans. This year I have funded 152 units for \$34 million in purchase loans. That's 500% growth in under 24-months. I'm on pace this year for \$60 million."

DOMINIC DANGORA HTSA GRAD 2014 & 2015

"I have gone from 16 fundings a year to over 200 fundings a year in under 48-months"

KEYNOTE: I AM NOT A ROBOT!

TRUST



TODD DUNCAN

CEO & Co-Founder
High Trust

3 Truths

1. You will always be selling to humans.
2. Must build trust + relationships that last a lifetime to create market demand...
 - * Follow up past clients *
 - * Make B2B your primary business strategy
 - Business 2 Business / Client / etc.
3. #1 initiative to focus is OPTIMIZING the customer experience; you cannot break their heart.

2 core beliefs about being a gamechanger | TRUST first, TECH second

1: Nothing changes until something changes

what are we doing every day that isn't working?
How do I become relevant in today's market?

2: One change can change everything
ex. mobile phone...

Game Changer Laws

#1: It's NEVER the market that determines your success, it's YOU

how to be disruptive?

positive attitude always

The best way to be in demand is reputation
the highest value comes from being known as specialist.

* I specialize in _____ ? *

ex. Home Loan Specialist (not order taker)

use the word; become the product

"Disruptive Branding" is everything in

* what is my disruptive branding?!!

Do one thing + do it the best way you can't

How to convey options on front end?

Show amortization of stuff / wealth in 10 years

game CHANGERS

Most LOs will quote you a rate. How I am different is:

Law #2: Change is inevitable; growth is optional
time to change is when you are still winning
change before you have to.

Law #3:

Mental Game first; execution game second

FOCUS ON WHAT YOU HAVE 100% CONTROL OVER
52 mins on, 17 off. Balance. Less Stress.

*Genius = 1. Intelligence 2. Curiosity 3. Grit 4. Timing

→ Where am I over-committed???. CHANGE it.

Law #4:

Comfort is the enemy of progress ~~****~~

Life is not supposed to be easy - The key to happiness

is purposeful progress. Attack that which is hard.

what does not doing the hard things cost you?!

DO NOT AVOID HARD CONVERSATIONS*

Where are you mastering comfort?

Law #5:

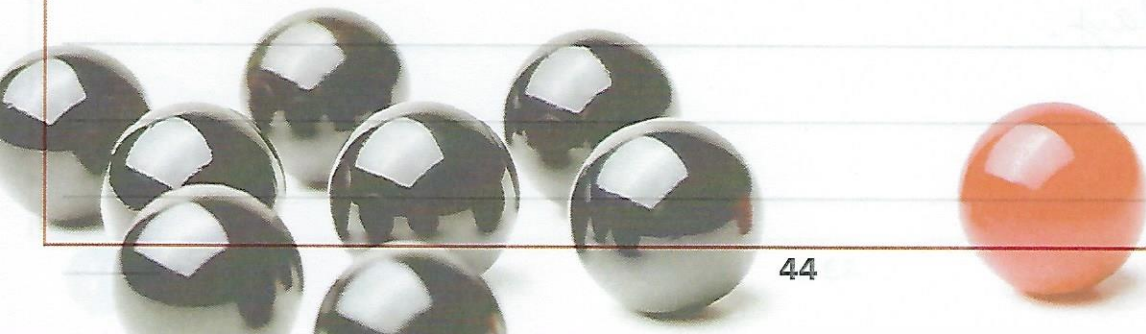
Compete with yourself + nobody else *

Only goal is to be the best version of you

No comparing to others. Make tomorrow different from today.

SALES MASTERY

TRANSFORM YOUR BUSINESS AND LIFE



KEY TAKEAWAYS:



TOP ACTIONS TO TAKE FROM TODAY

1. Streamline process + implement best programs

2. Work only w/ the best people

3. Specialize - call myself something different
signature line, website, FB page

4.

5.



TOP ACTIONS TO TAKE FROM TODAY

6.

7.

8.

9.

10.





CRM & MARKETING SOLUTION

- LOS Sync
- Loan Document Management
- Co-Marketing with Referral Partners
- Post-Close Marketing
- On-the-Go Mobile Accessibility
- Lead Capture Tools
- Email Integration
- Mortgage Reviews
- Video Emails
- Loan Milestone Emails & Alerts
- SMS App

ARE YOU A
WINNER?

Check your registration bag
for a Jungo game token

**STOP BY OUR
BOOTH TO
PLAY!**

AGENDA

Day 2: Thursday Oct. 11th

8:00 AM - 8:15 AM | Todd Duncan Morning Kickoff

8:15 AM - 8:30 AM | Power Shot for Health with Jonathan Roche

8:30 AM - 10:00 AM | Edge of Disruption with Best-Selling Author Peter Sheahan

MATTER: Finding opportunity in disruption to create more value and become the obvious choice. As the pace of commoditization accelerates and the emergence of technological disruption threatens our existing business models, we must find ways to remain relevant and differentiated in the hearts and minds of our customers! This inspiring, case-study rich session will show you how to find opportunity in disruption to reverse the downward spiral of commoditization and matter more to your customers than your competition. This journey will require that you: elevate your Value and understand the difference between value creation and value extraction, elevate your Boldness and move towards the very disruption that challenges you and your customers, elevate your Impact in the Five Critical Dimensions that clients and customers value most during times of rapid change, elevate your Perspective by learning at the 'Edge of Disruption' and becoming a thought leader in the business models of tomorrow elevate your Relationships to position you not just as a trusted adviser but as a strategic partner for your customers and act in a way worthy of your desired leadership position

10:00 AM - 10:45 AM | Break – Experience our Resource Partners

10:45 AM - 11:30 AM | The Ultimate Lender Agent Partnership

ELITE Originator Marty Preston and Superstar Top Producing Agent Jim Moore will blow your mind as they share their step-by-step process on how they convert nearly 100% of their buyers to closed transactions. This session will redefine for you the “future state” of how an LO and Real Estate Agent will perform in the marketplace. This fresh and proven plan will change your partnerships forever.

Marty gets 100% of Jim’s referrals, including sellers who are buying. Jim has gone from \$8M to \$40M a year in closed transactions through partnering with Marty!

11:30 AM - 12:30 PM | Game Changers Power Shots Panel: Building Referral Partnerships

Three top originators will share with you in individual 15-minute Power Shots, the key game changing strategies they are deploying every day to stay a step ahead of the competition. Topics to include:

Turn Your Referral Partners from Casual To Committed Relationship - Featuring Rick Scherer

Building Realtor Relationships with Lost Leads Conversations - Featuring Jessie Printz

Maximizing Opportunity: How to Make the Most Out of Each Loan - Featuring Kory Kavanewsky

12:30 PM - 2:00 PM | Lunch and Experience our Resource Partners

2:00 PM - 3:00 PM | Game Changers Power Shots: Think Differently

Building Client Wealth with Calum Ross: Does the idea of serving six and seven figure income earners seem appealing to you? Would business be more enjoyable if you added so much value that people would wait for weeks to talk and send you thank you notes when you agree to serve their referrals? Elite Originator Calum Ross will show you exactly how he has created more than \$1.8 billion of incremental net worth for his clients, making him highly sought after by Canada’s highest income earners. Get ready to learn and let this energized and passionate 10+ years Sales Mastery Veteran show you how to never have to look for business again!

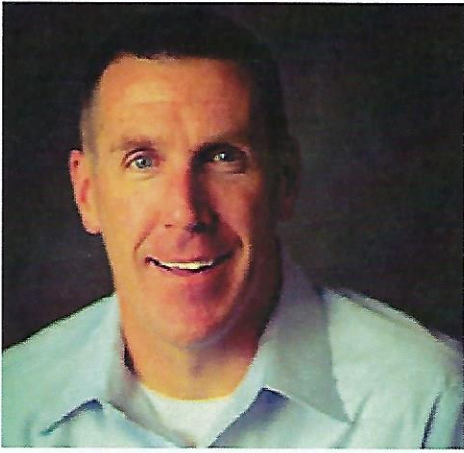
From Wimp to Warrior with Louise Thaxton: How long does it take to turn an average loan officer into an elite, top-producing Warrior? 52 days. Hear 3 proven tactics to win the war for success by changing your daily rituals, implementing disciplines of America’s elite special operations forces, and annihilating the habits, which have held you captive for years. It’s time. You were created to be a Warrior.

3:00 PM - 4:00 PM | 7 Words that Will Change Your Game Forever with Sue Woodard

Words Have Power – and even the simplest of words can be game changers, altering the trajectory of your business, your relationships, and your life. Words like “help” can bring the right people and systems into your business. “Thanks” can create powerful new relationships. “Yes” can open the door to new dreams. Small words – but they are game changers.

4:00 PM - 5:00 PM | Happy Hour with our Resource Partners

POWER SHOTS: For Health



Personal + energy! You AND
Team 'vibe' so imp. team.

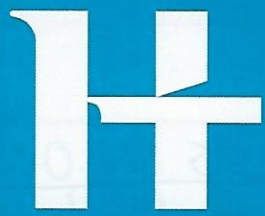
customer service

personalization

Vehicle to personal excellence is

MINDSET

JONATHAN ROCHE



HIGH TRUST COACHING™



HOPE BOURMAN
LEAD COACH

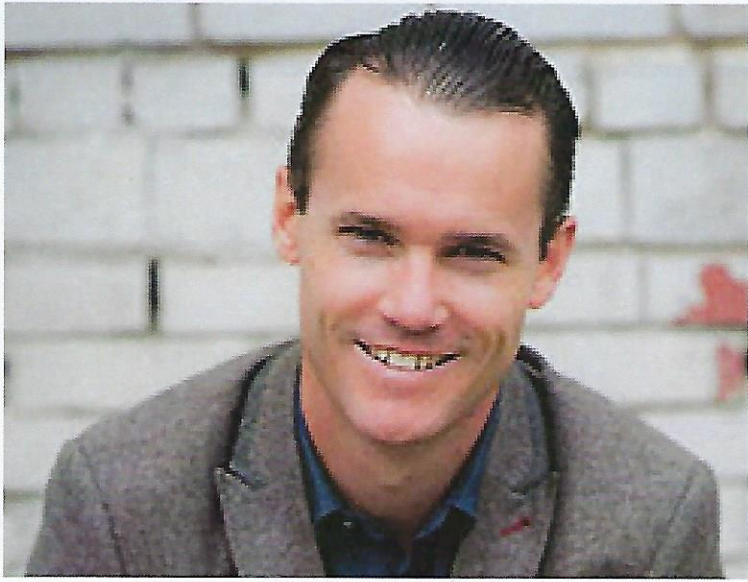
"I consider coaching an art and an honored role. My primary focus in coaching is to create an environment of success strategies, intentional execution, and inspire an expanded mind-set of what is possible."

Do You Have The Heart of a Coach?

**INQUIRE ABOUT BECOMING
A COACH AT OUR BOOTH**

EMAIL: HOPE.BOURMAN@HIGHTRUSTCOACHING.COM

KEYNOTE: Edge of Disruption



PETER SHEAHAN

CEO of Karrikins Group

Awareness v. Ownership
Strategy ~~vs~~ Psychology
OWN changes

Journey to accelerated growth

1. Tell yourself the truth
2. Focus on impact ^{align relentlessly} behind value
3. Go first ^{burning aspiration &} burning platform

Step into discomfort of market/
industry changes!

Awareness → OWNERSHIP
of changes.

* PICS of this presentation *

Stay in touch w/ Reality - don't fight it!

~~Agree~~

* Alleriate/eliminate pain points. for clients, real estate agents, even staff.

How do they (clients) see the world? understand and help them see your value. Reframe.

What keeps client/referral partner up at night?

F2F = higher satisfaction! want apps @ least.

Preferred means of communication of client ~~is~~ ^{is} ~~out~~ ⁱⁿ
Less is best - value is in the communication

* What are the points I lose clients?
fix/adjust these! ~~is~~ Focus less on others

game CHANGERS

Agreement v. Alignment #1 barrier is Capacity
w/ your team →

New ideas: Are they aligned ^{not good or bad, but} ~~or~~ or no?

Not amplification, but elimination as far as
what strategies + practices you use

If you want others to change their behavior, you must
do it first.

SALES MASTERY

TRANSFORM YOUR BUSINESS AND LIFE



KEY TAKEAWAYS:



SESSION: The Ultimate Lender Agent Partnership



MARTY PRESTON



JIM MOORE

Salesmanship is identifying needs + being able to solve them.

Partner Planning Meeting - at least once/month
→ what can I do? Where are pain points?
Annual Review

Face to face helps... client RE. Doubts are ^{often} financially driven
Realtor can get client 'special access' to me (lender)
then.. doesn't stop...

vision board. vision system! ^{ex. CRM, social media, etc.} prioritize systems.

confidence + trust
short, mid, + long-term goals of clients

know/ask



game **CHANGERS**

must do something worthy of trust to gain it.

Clients don't like dealing w/ 10 people. How to do this

~~Get~~ Be the first audience for all buyers

You don't shop loans, you get educated on loans

Get Listing clients as buyers!

Every client sent, try to send 1 back to partner
double business by taking care of client +
capturing referral. B2B so important. ♀

game CHANGERS

KEY TAKEAWAYS:

CREDIT REPAIR GAME CHANGERS



WHO WE ARE

We are a legal and ethical credit repair company. We develop unique strategies to help your clients repair their past and restore their present credit profile. Whether your client only needs advice or a total rebuild, we are here to help.

EXPAND

1

Grow your pipeline and generate more income by closing deals for clients that aren't qualified.

STRESS FREE

2

You are informed throughout the entire credit repair process and are notified when your client is ready.

SAVE TIME

3

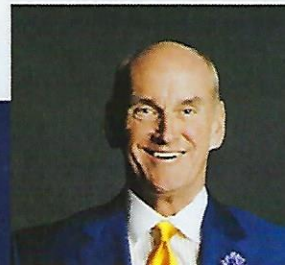
Save yourself the time and hassle of trying to fix your client's credit. We take care of the work.

300+ 5-STAR REVIEWS



TODD DUNCAN

"Every loan officer needs a competitive edge in today's market, and Blue Water Credit can help you close more deals, make more money, and turn 'No's' into happy clients."



INTRODUCING THE LATEST BOOK FROM DEB & TODD DUNCAN

Coming off last year's blockbuster, *The \$6,000 Egg: The 10 New Golden Rules of Customer Service*, Todd and Deb are bringing it again with the release of ***5 Stars: Building High Trust and High Ratings in the Digital Age***. Based on over 100,000 pages of research, *5 Stars* is the owner's manual for creating the performances, time and time again, that earn you the highest ratings and unleash the power of referrals throughout your ecosystem.

What 5 Stars Delivers:

- Positive Customer Engagement
- Higher Ratings and Referrals
- Increased Customer Loyalty

Client

WAVE

Responsiveness

Kindness

QUESTIONS

- What are your goals?
- How do you prefer to communicate?
- What is most imp. to you?

Realtor

WIDE

LISTEN

connection

education

Knowledge

updates + Kristens....

APPRECIATE

updates during process

Responsiveness

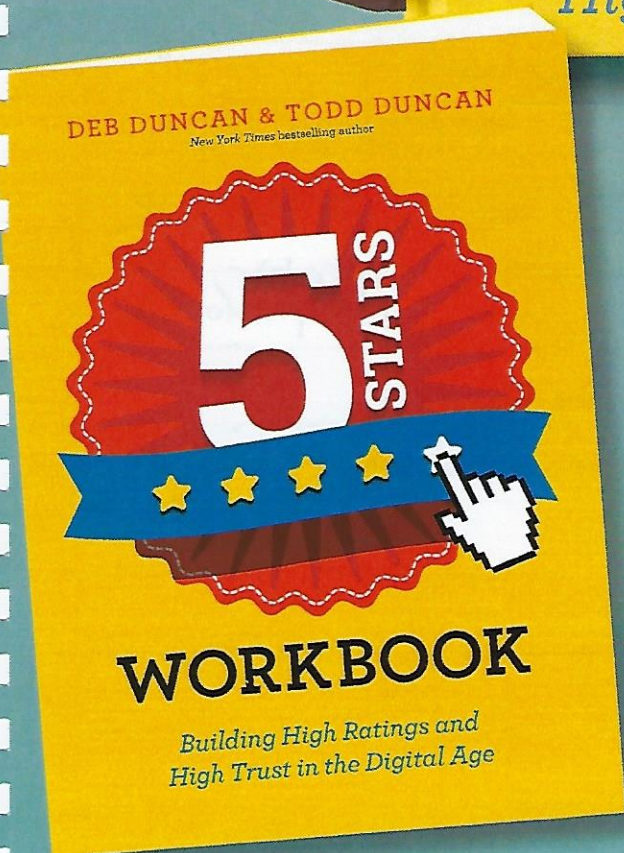
QUESTIONS

- Client management
+ fishing strategies?

- What are your pain points
- Who do you want to know
- Who is your audience
- What is your fav. platform
- Previous experience w/ LOS?

events for
THEIR clients/audience

AVAILABLE NOW!



“Building, accelerating, and growing trust is the number one opportunity in business today.”

— DEB DUNCAN

Book/Workbook

\$25

Train your team & partners

10 books &
10 workbooks

\$250

POWER SHOTS: Building Referral Partnerships

Turn Your Referral Partners from Casual To Committed Relationships



RICK SCHERER

drinks + events don't provide value :-

★ Give, give, give, then ask for the business.
Jab, Jab, Jab, right hook

never go to meeting w/ palm-up ^(asking for business)

★ never say: "I have really great rates"
"I have great service"

"I have best products"

EVERYONE HAS THESE

1. Commodity ^{is a constant struggle}

2. Differentiation

3. Transformation make a difference in life of partners ★

You can fire agents. DEPTH GAME.

How do agents get business? ① They Fish. (which sucks) ② Past Clients.

Lead with give

★ Most effective ↑

★★ "think of me every time you hear Real Estate" ★★

move relationships from casual to committed

★ HAVE POWERFUL RELATIONSHIPS w/ NETWORK
ex. CPA, financial adv., contractor, inspector, etc.
chiropractors,

Have the conversation! ★

→ co-brand a flyer + can give to network.

Service level agreement — white glove service.

game CHANGERS

Building Realtor Relationships with Lost Leads Conversations



JESSY PRINTZ

3 key thoughts:

1. The way you do one thing is the way you do everything ~~✱~~

but can't do everything for everyone.
Must take care of yourself!

must become selfish - ^{OWN TAKING} CARE OF YOU

*If I'm no good for me I'm no good for anyone.

2. Do the thing, have the power

Just do it - take the action.

you are more likely to act your way into feeling than to feel your way into acting!

List of top 10 actions, narrow down to top 3 - make sure it feels good + right + do-able + something you are good at.

3. What got you here won't get you there

Next level ...

w/ contacts... who are they? what you want to do w/ them?
at what frequency?

*How do I go from being on demand to in demand?
*stand in gap + create financial growth for business partners
help w/ conversion of leads



The Circle of Cash Flow: Making the Most Out of Each Loan

Your customer's network being your network...

Do you have a financial advisor?

Ask & dive in, build that relationship

*have client discuss w/ financial advisor

KORY KAVANEVSKY

"Power Partner Program" w/ financial planners

* B2B strategy * FINANCIAL ADVISORS

can I give your info out? Ask financial planners

DATABASE : make one + USE IT
call through it (sling!!!)

* call about something ex. "did you create living trust?"
→ call ALL of them ←
about 4x/year
"please think of me if you know of anyone needing a loan"
* BIRTHDAYS

Annual Client Review → not a voicemail



Realize the Full Potential of your CUTCO Closing Gifts



I've given Cutco engraved with my branding for over 10 years - all our clients love them! It's a high-quality tool that stays with them forever as a permanent reminder of the quality and service I provide - I'm never forgotten!. We love working with the team at Sharp Retention and giving the most effective cost-per-touch marketing tool of my career.

Kory Kavanewsky | Producing BM, CMG Financial

LEAVE A LASTING IMPRESSION



Receive a FREE Spatula Spreader for your home with your client gift order & LOCK IN PRICING here at the event.

WIN THIS \$1,146 BLOCK SET - every order placed OR referred receives ONE ENTRY FOR DRAWING - only at Sales Mastery!

Best Practices of Top Loan Originators when gifting CUTCO – simple strategies make all the difference

Each of these resources are available **FREE** with your order!

- Deliver using the 30 second SCRIPT
- Personalize the template for your GIFT LETTER
- Send your client a follow up GIFT VIDEO



**Your Info Engraved • Used Daily • Never Consumed
Guaranteed Forever • Made in the USA • High Quality**



www.SharpRetention.com



POWER SHOTS: Think Differently



Building Client Wealth

Don't need to re-invent the wheel,
use the good wheels of others.

*Now + end of year: *
Disruptive brand video
\$3-5,000

CALUM ROSS
follow on LinkedIn

How much money do I save for my clients +
how much wealth do I create for them?

1. knowledge
2. Value

Have the knowledge to help people make
great financial decisions.

SALES MASTERY

TRANSFORM YOUR BUSINESS AND LIFE

KEY TAKEAWAYS:

game CHANGERS

From Wimp to Warrior



LOUISE THAXTON

Change Your Brain

3 tactics

1. Get up: start early. Identify the mission.

2. Gear up

3. Show up

7 disciplines

~~Worrying~~

It is POSSIBLE. Read. Form daily rituals.

Think like a warrior.

Have a plan.

Be TOUGH.

Set + Live your priorities.

- ★
- ★ • Read, Reflect, Record
 - Possibility thinking
- ★ • 7 by 11: 7 things for tomorrow!!!
- ★ • Plan for day, weeks, month, year

FOCUS:
out of love not fear

- I will always place the mission first
- I will never accept defeat
- I will never quit
- I will never leave a fallen comrade

SALES MASTERY

TRANSFORM YOUR BUSINESS AND LIFE

KEY TAKEAWAYS:



HIGH TRUST COACHING™



BRIAN BOMAR

“Using Todd Duncan’s High Trust Selling System, we have developed our LO’s to produce an average of 209 fundings per year, each!”

**Are You Truly Helping Your
Loan Officers Win?**

**LIMITED SPACE AVAILABLE
SIGN UP TODAY**

VISIT: HIGHTRUSTCOACHING.COM



Got super jumbo alt doc?

up to \$15MM



FUNDLOANS

NMLS: 1202262

Contact us at:
760.388.588 or Info@FundLoans

Primary & Second Homes

- Loan Amounts up to \$15MM
- No Seasoning on Bankruptcy, Foreclosures, or Short Sales
- Bank Statement Loans to 90% LTV
- 12 Months Full Income Documentation
- 40 Year Interest Only Options

Non-Owner Occupied

- Loan Amounts up to \$15MM
- No Ratio and NINA Programs (inc. FN)
- Bank Statement Loans to 80% LTV
- No Limit on # of Properties Financed
- Foreign Nationals up to 75% LTV

FundLoans is a dba of Drop Mortgage, Inc. NMLS # 1202262 FundLoans is an Equal Housing Lender. FundLoans does not discriminate on the basis of race, color, religion, national origin, sex, marital status, age (provided an applicant have the capacity to enter into a binding contract), because all or part of an applicant's income may be derived from any public assistance program, or because an applicant has, in good faith, exercised any right under the Consumer Credit Protection Act, or on any other basis prohibited by law. FundLoans is a licensed mortgage lender NMLS ID# 1202262. FundLoans is licensed in the following states: Arizona: Arizona Mortgage Broker License No. 0932084 California: California Department of Business Oversight under the California Finance Lenders Law, License No. 60DBO46086 Colorado: Regulated by the Division of Real Estate Florida: Florida Mortgage Lender Servicer License No. MLD1392 Georgia: Georgia Mortgage Lender License/Registration No. 62287 Michigan: Michigan 1st Mortgage Broker/Lender License No. FL0021626 Montana: Montana Mortgage Lender License No. 1202262 Oregon: Oregon Mortgage Lending License No. ML-5406 Texas: Texas-SML Mortgage Company License Washington: Washington Consumer Loan Company License No. CL-1202262 Wyoming: Wyoming Mortgage Lender/Broker License No. 3200

KEYNOTE: 7 Words that Will Change Your Game Forever



SUE WOODARD

Chief Customer Officer
Total Expert

Power of words

↳ part of your action

- need to leverage technology
- do the things technology can not

say

Yes...

organizing
streamlining
embracing new things

No...

negativity
wasting time
unnecessary spending

Behind every wise No, is a better Yes.

- Say no when it protects your principles & values
- Say no when it keeps you focused on your own goals
- Say no when it protects you from being used
- Say no, when you need to change course

↳ allows you to say yes to:

• TIME

• Opportunities

THANKS → be grateful!! So many opportunities we have
NO when — then thanking

HELP → competent advisors before it's too late
who could I help? ...

ENOUGH → I have enough

I've had enough

game CHANGERS

★ Sorry not sorry — don't be sorry
if it's not your fault!

...even returning call a little later.

...when taking the floor!

Don't be sorry!! when: not @ fault

taking the floor

sticking to values

Not actually sorry

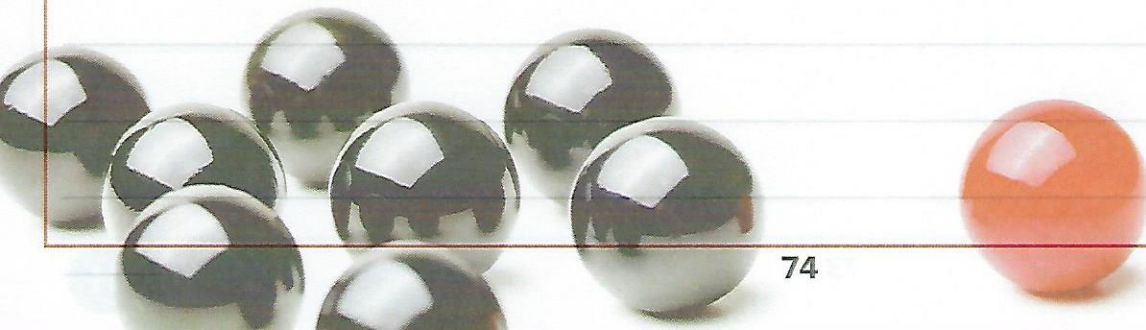
there is a BUT

WOW in people... customer care — wow them
every step

Pause, Think, Speak ★

SALES MASTERY

TRANSFORM YOUR BUSINESS AND LIFE



SALES MASTERY

TRANSFORM YOUR BUSINESS AND LIFE

KEY TAKEAWAYS:



TOP ACTIONS TO TAKE FROM TODAY

1.

2.

3.

4.

5.



TOP ACTIONS TO TAKE FROM TODAY

6.

7.

8.

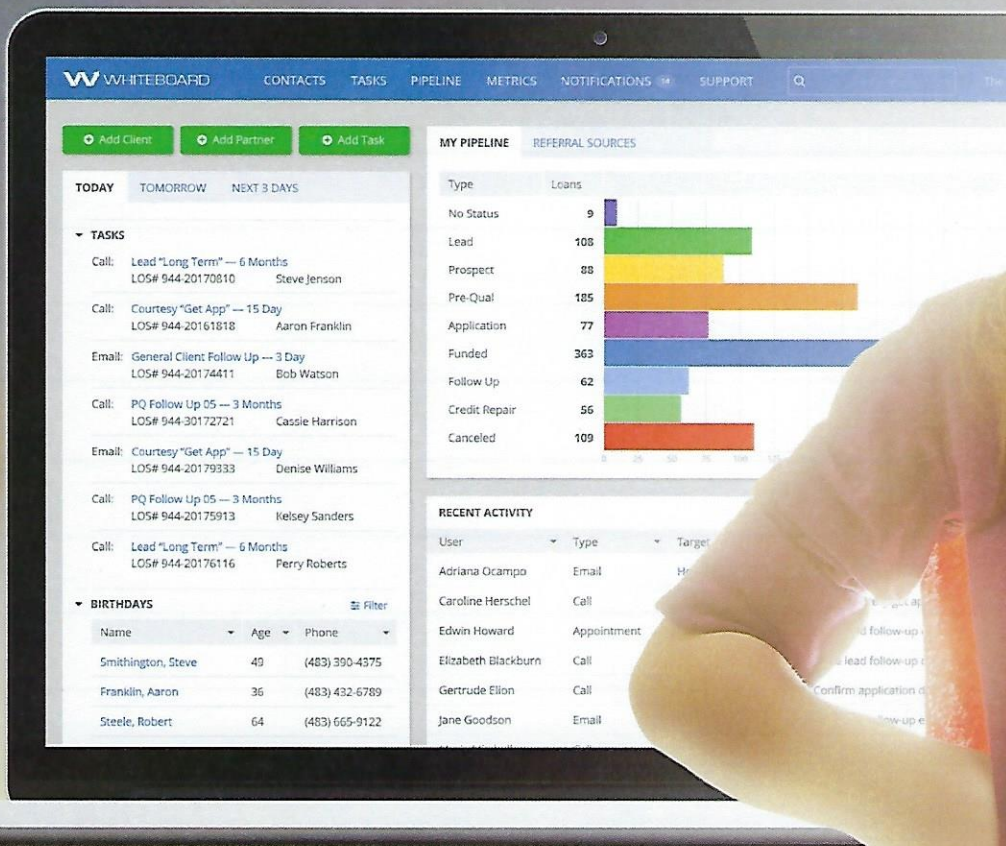
9.

10.



RELIVE YOUR MOST SUCCESSFUL DAY


EVERY DAY



The Mortgage CRM built exclusively for Mortgage Pros

What makes a Top Producer a game changer? They build trust and choose the right tools to deliver the 5-Star experience. Top Producers beat their competition to the new lead and keep borrowers and partners updated throughout the loan process. Whiteboard CRM is the right tool on day one—you'll close more loans, create better relationships, and increase your referrals.

 **Team-Based Texting**

 **Call Prompts with Scripts**

 **Daily Tasks**

 **Automated Marketing Campaigns**

Sales Mastery Show Special: 3 Months FREE Texting and 1/2 Off Set-Up

whiteboardcrm.com • 1-866-333-6311

AGENDA

Day 3: Friday Oct. 12th

8:00 AM - 8:15 AM | **Power Shot for Health with Jonathan Roche**

8:15 AM - 9:00 AM | **The Mindset of Being an ELITE Producer**

Todd leads a robust teaching on the three character traits of being uber successful. After coaching thousands of top producers and interviewing over 1,185 Superstars, you can model their behaviors and as a result, your life and business can be transformed.

9:00 AM - 9:30 AM | **Game Changers Power Shots: Marketing That Will Never Fail**

No Shiny Objects: Marketing Basics That Will Never Fail You with Karen Deis: It seems like every day, there's a new social media platform. A new phone app. An untested marketing idea. There's a lot of noise to tell you about new ways to use new products in your mortgage business. The ideas that mortgage industry icon, Karen Deis, will share are strategies that have worked for others for years and years. They are not the next shiny object. They are not rocket science. You may even think they are boring. But each one is designed to get engagement (and leads) from real estate agents and consumers—which continue to be the name of the mortgage game.

9:30 AM - 10:00 AM | **Game Changers Power Shots: Achieving Personal Mastery**

Becoming an ELITE Originator with Cody Hardridge: Having closed over 1,500 loans in the last 4-years, Cody will walk you through the step by step process of how he went from ordinary to extraordinary! Learn from this mega originator the power of an Elite Mindset, Skill Acquisition, Execution and Scaling to unleash your future to a possibility of serving thousands of families.

10:00 AM - 10:45 AM | **Break – Experience our Resource Partners**

10:45 AM - 11:30 AM | **Disruptive Conversations: The Future of Influence with Todd Duncan**

There is a science to getting prospects to trust you and say YES and let you become their trusted advisor. What is that secret sauce? Todd will share the newest concepts of getting conversion to the highest level possible. Concepts like Endorsement Value, Advice Packaging, and Value Pricing plus more will unveil themselves in this game changing session.

11:30 AM - 12:30 PM | **Game Changers Power Shots Panel: Moving From Price to Advice**

Sales Mastery Panel/Speaker Committee Leader, Linda Davidson, hosts this panel of three Top Producers, Michael Harrington, Cory DePass, and Steve Haney with practical application of influence moving from price to advice. These top originators boast very high conversion percentages of Lead to Loan to Funding. Learn what they say! Hear them respond! See their unique positioning! Take their one-liners and dialogue and incorporate them into your conversations and gain the confidence to close!

12:30 PM - 2:00 PM | **Lunch and Experience our Resource Partners**

2:00 PM - 2:30 PM | **Game Changers Power Shots: Innovate**

Changing Your Mindset with Craig Sewing: Former \$100M Producer and now CEO and Host of The American Dream, Craig Sewing will teach you in this disrupted market how to gain MARKETshare by being a great MARKETer. Learn how to leverage Video, Digital and Social Media to gain Realtor relationships and Consumer Direct business.

2:30 PM - 3:00 PM | **Game Changers Power Shots: Innovate**

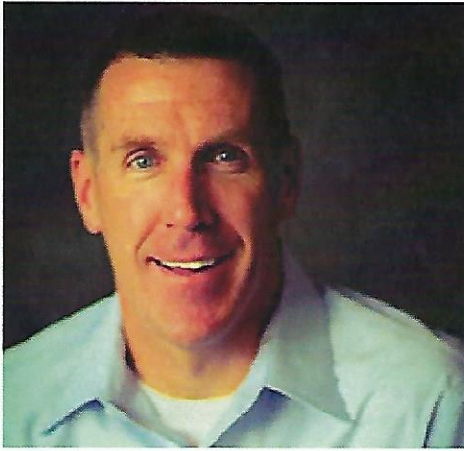
Re-Imagine Your Relationship with Renters, Homeowners and Referral Partners, with Ryan Grant: ELITE leader and \$150,000,000 producer, Ryan Grant, will show you his disruptive value proposition that has Renters, Homeowners and Referral Partners lining up for time with him and his team. You'll change the way you look at your role as a Mortgage Professional and create untapped opportunities in this new market. Learn steps to making a significant difference in the lives of the people you work with and change the way the game is played.

3:00 PM - 4:00 PM | **Bluefishing with Best-Selling Author Steve Sims**

The man who created Bluefish, the internationally famous company that makes once in a lifetime events happen for the rich and famous reveals to the rest of us his trade secrets for making things happen.

Steve Sims's day job is to make the impossible possible. With his help and expertise, his clients' fantasies and wildest dreams come true. Getting married in the Vatican, being serenaded by Andrea Bocelli, and connecting with powerful business moguls like Elon Musk are just a few of the many projects he has worked on. He rarely reveals how he accomplishes the feats that make his clients so happy. But now for the first time, Steve shares his practical tips, techniques, and strategies to help Sales Mastery attendees break down any obstacle and turn their dreams into reality.

POWER SHOTS: For Health



JONATHAN ROCHE

TODD DUNCAN'S *ELITE*

Includes

Exclusive Access to Your Own Board of Advisors of 24 of the Nation's **ELITE** Performers

2-Day Master Class Workshop led by Todd Duncan

2 **ELITE** 2-Day Retreats at 5-Star Resorts

Personalized Monthly Mentoring and Coaching

Focus Areas:

8 High-Performance Webinars

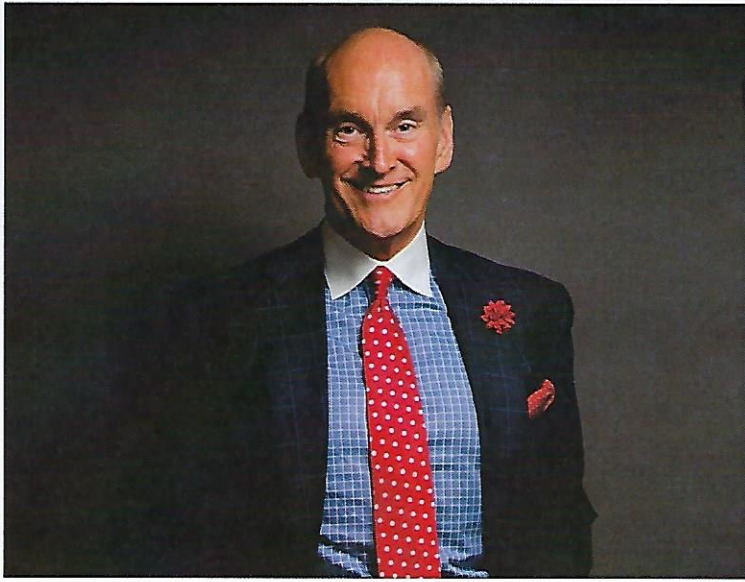
- Game Changing Masterminding
- Advanced Business Strategy and Planning
- Building World-Class Teams
- Optimizing Operational Efficiency
- Developing Systems to Scale
- Leadership Skills
- Executing B2B and B2C Marketing for Disruptive Growth
- Enhanced Work Life Balance

LIFE CHANGING

Only 14 New Memberships available.

All members are vetted by our Admission's Faculty to ensure the highest caliber of members

SESSION: The Mindset of Being an **ELITE** Producer



TODD DUNCAN

CEO & Co-Founder
High Trust

① Elite are able to SAY NO and walk away when necessary.

Money doesn't compensate for personally degrading relationships.

Do not walk away until given it my best shot.

w/ referral partners → Chemistry first, conversion second
Doubt means don't

Your life is more imp't than trying to do business with someone ~~that~~ bad (basically)

② Elite are strategic interviewers + active listeners

a great question is the most powerful force in the world

★ ★ WRITE DOWN 10 Strategic Questions ^{for} clients

★ The more you listen the less you have to sell

Purposeful questions drive trust + uncover opportunities
applies to realtor partners too! Asking purposeful questions means you don't have to sell.

Elite know their competitors + act differently

game CHANGERS

Be different:

Go where the competition doesn't go

Do what " " " do

Say what " " " say

the words you use are so imp. (Scripts from 7st night)

ex. Video of Ryan from Million Dollar Listing —
Take Risks, Commit, DO IT, and ask
hard questions!

④ Top Producers will always distance themselves from the rest.

Never ever ever ever ever give up.

* They act as if they have already won, even if they haven't.

First question is where is your energy going?

The best or the rest?

If you give your best to the best, you will get the rest!

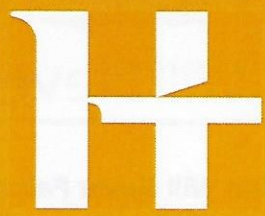
You attract what you have

ex. mediocre LOs =
attract mediocre

SALES MASTERY

TRANSFORM YOUR BUSINESS AND LIFE

KEY TAKEAWAYS:



HIGH TRUST COACHING™



JESSY PRINTZ

“With High Trust Coaching I have doubled my business in less than a year. Through execution of High Trust methodology and strategies, I have accomplished measurable success and improved my work-life balance in the most enriching ways possible.”

Who's Coaching
You To Success?

LIMITED SPACE AVAILABLE
SIGN UP TODAY

VISIT: HIGHTRUSTCOACHING.COM

POWER SHOTS: Marketing That Will Never Fail

No Shiny Objects: Marketing Basics That Will Never Fail You



KAREN DEIS

keep in touch w/ past clients

CRM → Top of Mind — Sinefine Jungo

Low cost + no cost sales + marketing...

FROM DAY 1: Introduce Your Team

- in person, phone, email

Printed version of the team. Include photo, their job, why may contact
Send copy to Listing + Selling agent maybe even buyer!

social media!
"Meet My Mortgage Team"

Handwritten Notes → send them. Listing Agents, trans coordinators, ~~Selling~~ Buyer, Seller, RE Agents broker owner
Title ppl, processors
Thank yous...

don't use black ink...
send every day.

Photos @ closings → Put in office!! send them a copy

Post-closing → keep in touch!!
*Closing book (?) for app, Amort. sched. ~~note, CD,~~
mail ~~them~~ to them or give @ closing

"When you decide to purchase another home or refinance, find this booklet + call me"

*Annual Real Estate Review comp. market analysis
send every year on anniversary
+ Bio + RE Agents bio
not a formal appraisal

Realtor Roundtable Mastermind Meetings
not about mortgages...

Bi-monthly
By invitation only! Agent can invite another agent

Event topics

- accountants
- videos
- field trips
- home builder
- appraiser

- self-defense
- video class

game CHANGERS

FB posts:

- ask questions that ppl want to respond
- know how you generate leads from responses
- comment on all responses

★ If a person wanted to buy your home today, ★
would you sell it?

★ If you could change one thing about your home, ★
what would it be?

★ RE Agents: what would you say is the ★
most difficult part of your job?

What do you think the average time is to
close a purchase deal? Refi?

RE Agents & Clients CRAVE personal attention

KEY TAKEAWAYS:

Build your business on a solid foundation.



POWER SHOTS: Achieving Personal Mastery



CODY HARDRIDGE

Becoming an ELITE Originator

Step 1: Attain Clarity

*what EXACTLY do you want

Step 2: Decide ~~what~~ WHO you must become

*Become more than you are today.

*Who do you need to become?
Actions? Mindset? Skillset?

Execution? Support team?

What does it look like? See it + do it

Step 3: Develop an Elite Mindset

I will not be denied. I will work harder, smarter, and be more consistent.

Daily success ritual w/ positive affirmations...
people want to do business w/ me, I am the #1 originator in TX, etc.

MASTER your inner monologue.

Step 4: Develop an Elite Skillset

1: Learn how to sell - influencing referral partners.

2: How to harvest referrals -
strategically place yourself into the mind of your referral partners.
Hardwire into → Be committed to this.

3: Master Self-Management -
habits!! 1. Set face to face appts + deliver high-trust interviews
2. Regularly call them + hardwire yourself in their brain

Step 5: Relentless execution of the above

3 step process: - Set appt w/ myself
- Remove distractions

Step 6: Build a world-class team

- define a world-class mortgage process
- assign value to every step

game CHANGERS

- would I pay someone \$1,000 an hour to do this? If not, lower priority

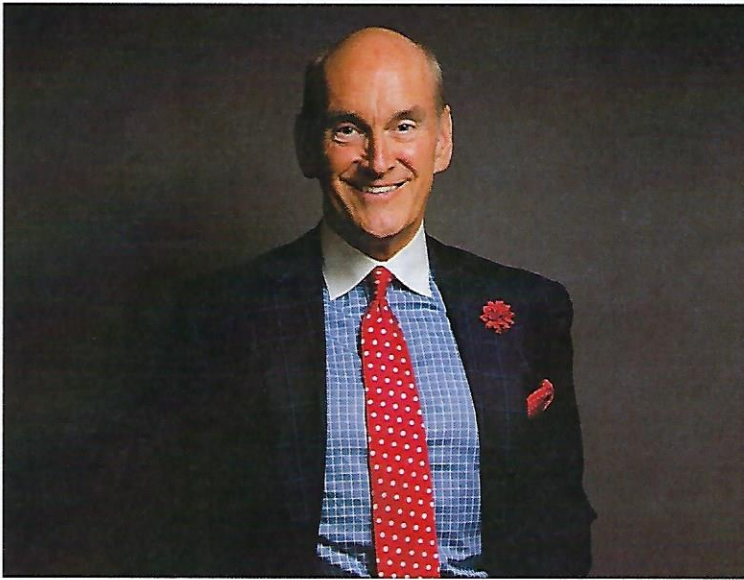
Onboarding plan, training plan, ^{implementation} integration plan
All low-value activities ... to assistant ^{each time you hit capacity}

5 people closed 321 units total (4 staff) 5 staff for 447 units

KEY TAKEAWAYS:



SESSION: The Future of Influence with Todd Duncan



TODD DUNCAN

CEO & Co-Founder

Disruptive Conversations

To create more influence:

1. Ask Better Questions

“would you like to miss out on a million of commissions...?”

“has the lender you have talked with shown you the side-by-side and how it will grow your wealth?”

2. Have deeper conversations

★ Influence ★

★ One-to-one referral is the most powerful form of influence there is.

★ Marketing is actually what other people are saying about you.

★ Highest conversion + lowest cost is one-to-one referral
WOM = word of mouth = 65% of business referrals

Video - yearly review

First Call

What doing @ each step to create endorsement value?

ASK questions first — about them then emphasize your VALUE.

ex. how much cost?
how much will you get out of it?

never lowest rate or cost but always the best @ formulating you a plan to save \$

game CHANGERS

Differentiated worth - WHAT IS MINE + PUT
A \$\$ WITH IT

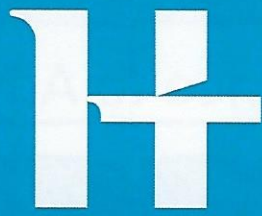
Dollarize the Differentiation - + be confident in
your value
Increase your face-to-face-meetings.

SALES MASTERY

TRANSFORM YOUR BUSINESS AND LIFE

KEY TAKEAWAYS:





HIGH TRUST COACHING™



RYAN CRAMER

“In 2016 I worked 4,380 hours and earned an average of \$42 an hour. In 2018, I will work less than 2,000 hours and earn \$149 an hour. Best of all I’ve gone from totally stressed out to in control and enjoying the business and from zero vacations to 3 European trips in the last 12-months!”

Are You Ready To Grow Your Business?

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SIGN UP TODAY**

VISIT: HIGHTRUSTCOACHING.COM

game CHANGERS



CORY DEPASS



STEVE HANEY



video committing to on-time,
pre-underwriting, etc.
Disruptive guaranteed EM deposit

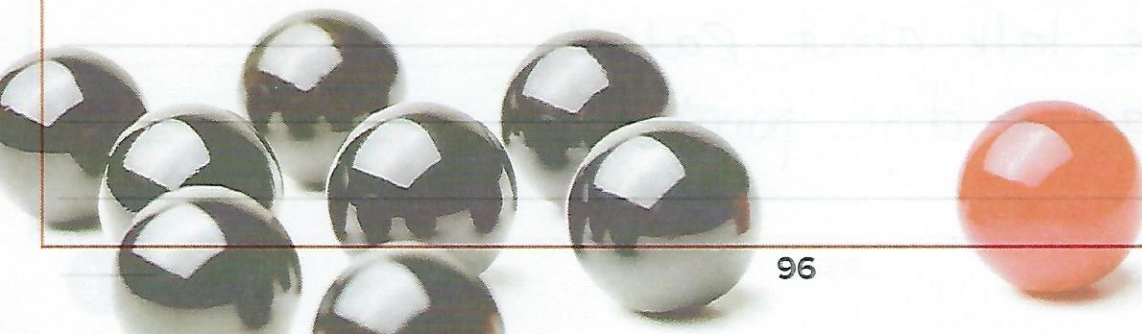
- * How am I eliminating the risk of choice?
ex. Cory's \$500/day not on time, already approved, Like a cash offer
- * How successful about interrupting normal thought process?
ex. importance of normal pre-approval... makes it not imp.
- * How to use performance-based disruption to blow-up competition's value?
Strengthen referral system !! ex. Teri's lead... send her something to send to clients to

"So before we talk about Rate"
compare par + disc. points



SALES MASTERY

TRANSFORM YOUR BUSINESS AND LIFE



game
CHANGERS

KEY TAKEAWAYS:





The High Trust™ Borrower Presentation

You will go in-depth with Todd Duncan and Marty Preston as they teach you strategies that will give you confidence in your selling process to enable you to build high trust relationships with borrowers.

The High Trust™ Borrower Presentation delivers:

- Faster Trust
- Increased Conversion Rates
- Less Transaction Stress
- Higher Customer Commitment
- Increased Loyalty
- More Referrals



Marty Preston has designed the finely crafted and value rich **Borrower Presentation** based on the High Trust™ principles. Using the unique approach, Marty's team produced over \$200,000,000 last year in closings, impacting the lives of over 1,000 families. Marty believes that educated advice and creating a customized Home Loan Strategy increases trust, protects the borrower and wins their business for life.

Borrower
Presentation

Price
\$ 295

**BUNDLE BOTH
TODAY FOR ONLY**

The 5-Star Borrower Experience

You will go in-depth with Todd Duncan and Ryan Grant as they teach you strategies to build a world-class Borrower Experience.

The 5-Star Borrower Experience Delivers:

- Increased Customer Loyalty
- Higher Ratings & Reviews
- Positive Customer Engagement
- World-Class Client Experience
- More Referrals

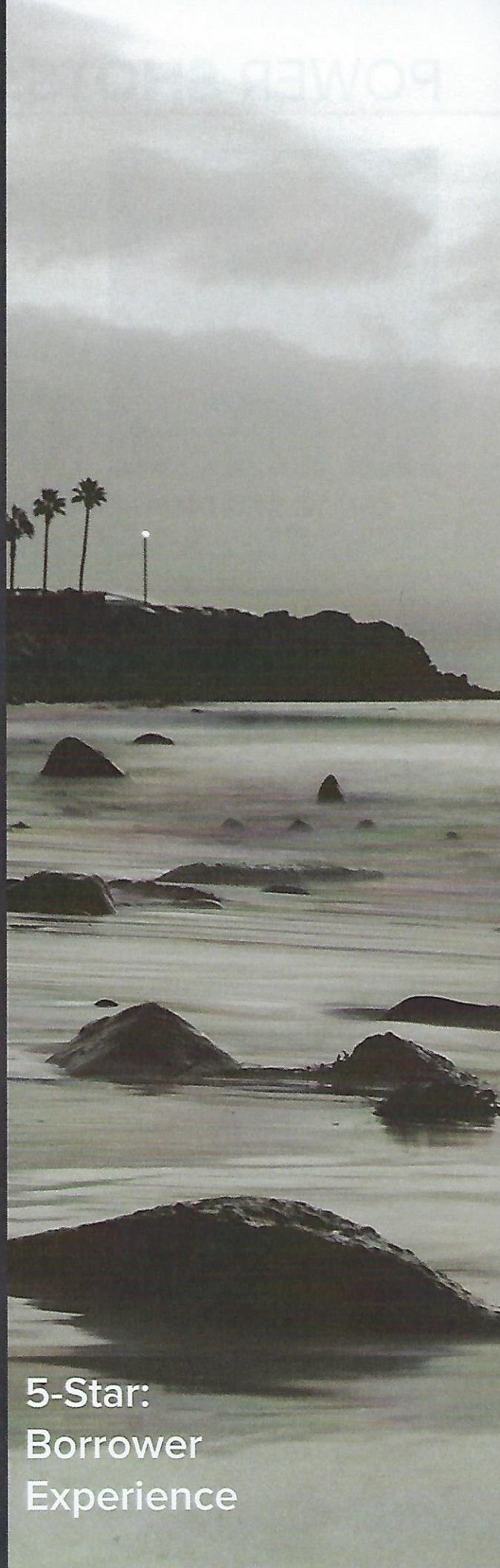


Ryan Grant has been working in the mortgage industry for 11 years and is ranked amongst the top 50 Mortgage Consultants in America. During his 11 years in the industry, Ryan has owned his own mortgage company, he was Director of Retail Sales for a mortgage bank, he has been a Branch Manager and a Sales Manager as well as a Mortgage Consultant. His experience in these different positions has given him an invaluable insight into the mortgage industry and taught him how to provide the best possible service to his clients.

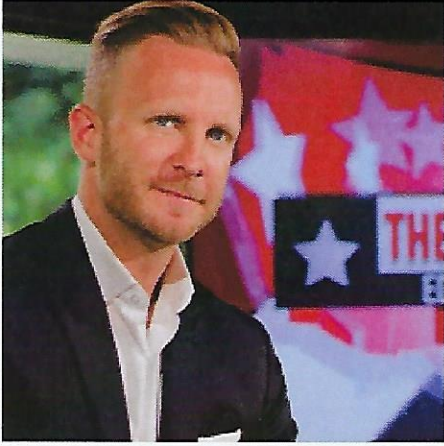
Price

\$ 295

\$495



5-Star:
Borrower
Experience



CRAIG SEWING

Changing Your Mindset

Facebook partner page

H2H human to human

media person on team...
videos, quality content

game CHANGERS

KEY TAKEAWAYS:

POWER SHOTS: Innovate



RYAN GRANT

Re-Imagine Your Relationship with Renters, Homeowners and Referral Partners

(applies to lenders & Realtors)

- educating clients + asking questions at the beginning. What is best for them, not just OK 30 YR FIX ✓

Sales Funnel : size matters
connection + value increases

Change the way we look @ each conversation

Realtor Partner Mentality ^{teach how to "ride the bike" differently}

teach them to send people to financing team
*give every potential buyer financial education

Mortgage Professional Mentality
didn't need to be great, just there.

→ Equity Analysis Plan ← + → Financial Transition Planning →

w/ clients

what does avg person do? who they call? Nothing

Teach agent to recommend

Increases Listing Conversion for Agents *

Not now or never clients → use these plans + convert

Long-Term Business Model

- Get to the client 6A make decision to help them make a good one

- keeps revenues fair

- Look @ long term opportunities (ie kids, inheritance, etc)

Be more educated on this stuff

are you coming to
start of
homeownership"

game CHANGERS

income, assets, insurance, retirement, etc. → Where does this need to get better?

Realtors "What's ^{the} process for our clients?" estate plan? insurance plan?
then REFER

6 steps

- Mentality — not transactional. Opportunity & Value
- Great Partnerships — ex. CPA, financial planner, estate planner
- Training in Overall wealth Management strategies ~~****~~
- Systems — CRMs, follow up
- Team — know what you need to spend your time doing & unload the rest
- Direct to consumer — let ppl know how you are different

KEY TAKEAWAYS:

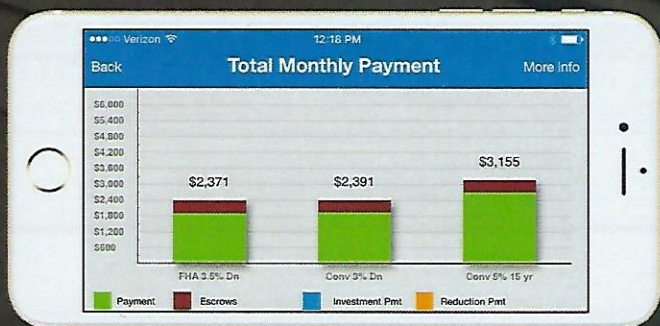
Become trusted Advisors who focus time on High Touch, High Value, & High Trust activities.





Modernizing Mortgage Lending with Digital Mortgage Advice

Turn pricing and fee information into visual engaging advice. Convert leads to loans easier and faster with a focus on building wealth and financial well-being.



Email VIP@mortgagecoach.com to request a demo today!





HIGH TRUST COACHING™



RICK ALCALA

Coaching with High Trust helped me focus and stay accountable to the disciplines in my business.

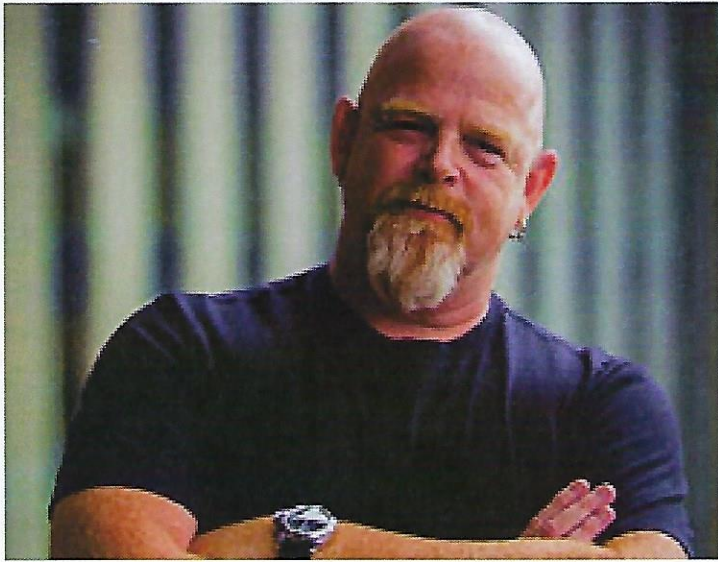
Like fitness, it's the details, tweaks to your routine, and personal adjustments that take you to the next level. High trust coaching can take you from good to great!

Are You Ready To Take Your Business To The Next Level?

**LIMITED SPACE AVAILABLE
SIGN UP TODAY**

VISIT: HIGHTRUSTCOACHING.COM

KEYNOTE: Bluefishing



STEVE SIMS
stereedsims.com

The 3 E's:

Engage

Entertain

Educate

* need to be impossible to misunderstand
→ should be impossible to fake negative connotations or impact from social media, emails, etc.

* Mail - handwritten

* Text - can send mass ones! Texts more effective than email

* Audio - can send ^{an} audio text!!

or straight to vm thing

* Video - phone video ^{most valuable} texted
Go Pro raw videos

ex. every Tues:

Respond to emails
via NOT email!

The grass is always greener
In your hotel - always cooler
to be somewhere / send something
interesting.

* Personal branding

Behind the scenes

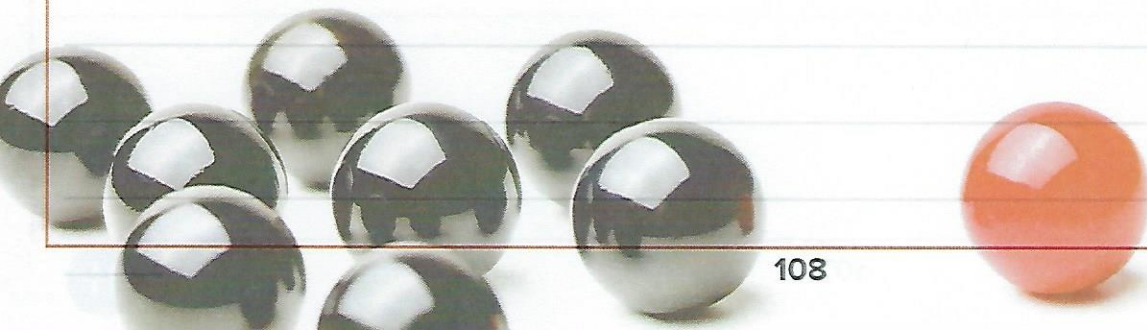
SALES MASTERY

SALES MASTERY



SALES MASTERY

TRANSFORM YOUR BUSINESS AND LIFE



game
CHANGERS

KEY TAKEAWAYS:



TOP ACTIONS TO TAKE FROM TODAY

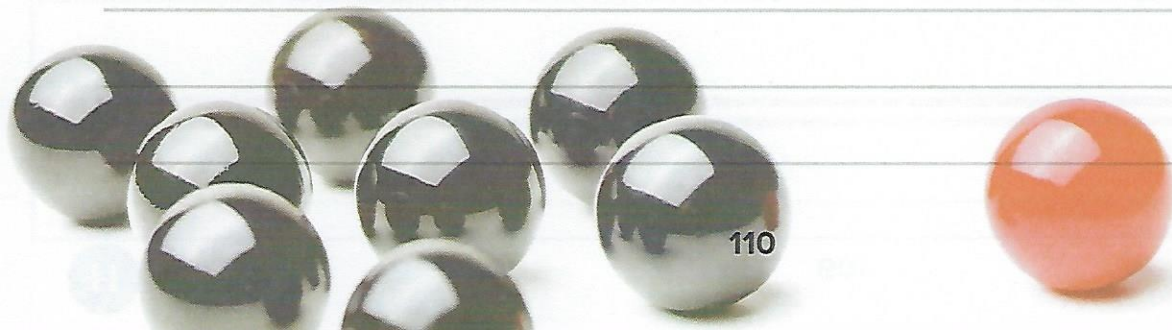
1.

2.

3.

4.

5.



TOP ACTIONS TO TAKE FROM TODAY

6.

7.

8.

9.

10.



REAL ESTATE SEARCH THE COMMON DENOMINATOR

Consumer Direct and National Media Giants have it.
What about you?

● \$439K

● \$463K

*Close more transactions by engaging and monitoring
consumers with real estate search*

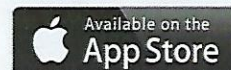
The only mobile search app with 100% MLS listing data

Now Fully Integrated with



HomeScout[®]
NATIONAL MLS

www.nexgenhbm.com/homescout
info@hbm1.com • 952-831-1919



AGENDA

Day 4: Saturday Oct. 13th

8:00 AM - 8:15 AM | **Power Shot for Health with Jonathan Roche**

8:15 AM - 9:00 AM | **Game Changers Power Shots: Maximizing Social Media**

The Proven \$100,000 Income Recipe for Social Media with Larry Bettag: Do you want the complete recipe for \$100,000 in yearly origination income using Facebook and Social Media- at NO cost? In this fast pace and fun 45 minute segment, Larry Bettag will give you 10 Must Do Things, FB 2018 Algorithm changes you need to know and how NOT to do Social Media. Larry's proven recipe will be one you will want to take home and implement immediately! This is one you don't want to miss!

9:00 AM - 10:00 AM | **The Career of a Lifetime with Mortgage Legend Tom Ramirez (and joined by superstar Thomas Ramirez)**

Todd teams up with Superstar Tom Ramirez, as Tom shares the top 5 Game Changers he has made since first interviewed by Todd in 1992 that has allowed him become one of the most successful producers of all time- funding over 2 Billion in loans! They are then joined by Thomas Ramirez who shortly after graduating from college, followed in his father's footsteps and joined the mortgage industry. In the short three year period that Thomas has been originating, he has been named Rookie of the Year for his company, has been recognized as NAHREP's Top 250 Latino Mortgage Originators and has taken the title as Sales Manager for their Pico Rivera branch. This session will be one of the most powerful in Sales Mastery history- you can't miss it!

10:00 AM - 10:45 AM | **Break – Experience our Resource Partners**

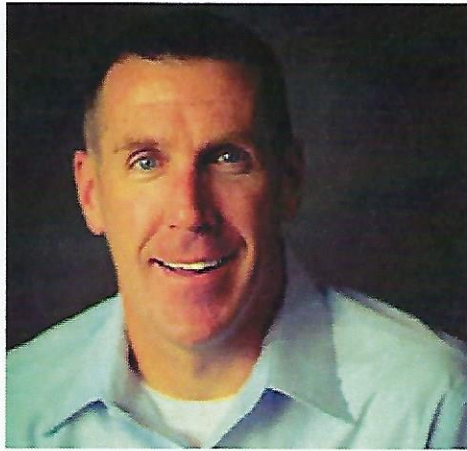
10:45 AM - 11:30 AM | **The Decision of a Lifetime with Todd Duncan**

Todd's closing keynote always hits the mark, bringing to a strong close the life-changing week at Sales Mastery. This year Todd unpacks one skill set to unleash your purpose and help you optimize your potential! His promise to you is this session will change your life forever.

“Learning and innovation go hand in hand. The arrogance of success is to think that what you did yesterday will be sufficient for tomorrow.”

- William Pollard | Physicist | Manhattan Project

POWER SHOTS: For Health



JONATHAN ROCHE

win mentally then physically

Don't wait until the wave
knocks you off

Controlling your negative voice

1. Acceptance that it is there
2. Awareness of opportunity to change
3. Tools + Strategies

3 versions of your
negative voice:

1. Bully

2. Distractor

you don't need to...
tomorrow...

3. Buddy

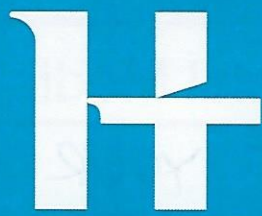
ex. focus on family not health
you look great don't
worry about it!

Positive voice can make
significant difference!

Start @ the beginning of
the day!

Commit to health
mental + physical

A lot of time w/ these



HIGH TRUST COACHING™



JENNIFER WILSON

“With the guidance of my High Trust Coach, I have been able to focus more on building my business the right way. I have positioned the right staff in place, which allowed me to focus on creating High Trust relationships and generating new business. High Trust Coaching is a huge part of my success in 2018.”

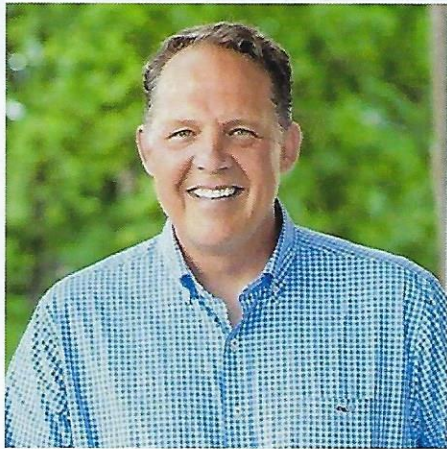
Who's Coaching You To Success?

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POWER SHOTS: Maximizing Social Media

★★ BUILD + MONETIZE YOUR BRAND



The Proven \$100,000 Income Recipe for Social Media

Using Facebook

Personal Page - FREE

Business Page

FB Ads

LARRY BETTAG

Xinnix Know Me, Like Me, Trust Me

How to not build a FB audience - ~~too~~ Political posts, TMI, hate/vitriol, low emotional intelligence

TO DO: • Know Your Audience ← ^{Consumer} Referral Sources
• Like Your Audience - engage w/ them! _{Reactors, CPAs, Finance, Advising}
not just popular → Follow influencers!!
making changes

★ Show the world who you are + what you're about

- Follow influencers ↑
- Build Your Audience

★ use to find things out about ppl... more → Likes
• Be Fun + Engaging _{Common Friends}
↳ let it be personal + transparent

- 2018 Algorithms ...
- Comments
 - Reactions > Likes
 - Replies - acknowledge those who comment
 - Shares + engagements
 - Complete Your Personal Profile
"edit profile" or page
 - Video, video, video - make it Live

★ FOR B DAYS 2

game CHANGERS

Algorithms Ctd.

• Audience Creation -

• Local activity *

* Post must be liked in 70 seconds ^{in order to} show up

* Time you post is impt. (pic on phone)

* POST EVERY DAY **

Like your own post --- ??

* Like 10 other people's posts per day

* Comment on 10 other ppl's posts per day

* Respond to comments on your post

Michael Hyatt -

* Study influencers & engage when appropriate
can add value to influencers?

* Avoid controversy & keep it Real

Recipe :

- * Family

- * Humor

- * Keep it real & authentic

- * Be Fun & Engaging to build your audience

- * Be Authentic

- * Keep it Clean

- * self-deprecating (humor)

- * Potential Problems - don't do too much

- * Inspiration

* Reality 117

SALES MASTERY

TRANSFORM YOUR BUSINESS AND LIFE

- * Questions!!! So good, but don't over-use
- * Educational Information - i'm the best + very good @ what I do
- * No more than bi-weekly self-promotion
don't even maybe use the ppl that are your clients
ex. did you know there is now...
- * What's happening in the community

* If tagged in post - respond immediately

KEY TAKEAWAYS:

TOP 10

- Friend everyone
- Post every day
- Like your own
- Get Local
- VIDEO
- etc.

Insta to FB?

OK ✓

Whatever you do,
do it well

Public? posts?

YUP ✓

Friend competitors?

YUP ✓

Use discretion w/ adds (friends) doesn't schedule, prob best to be organic.

How to find influencers? Find them in the community

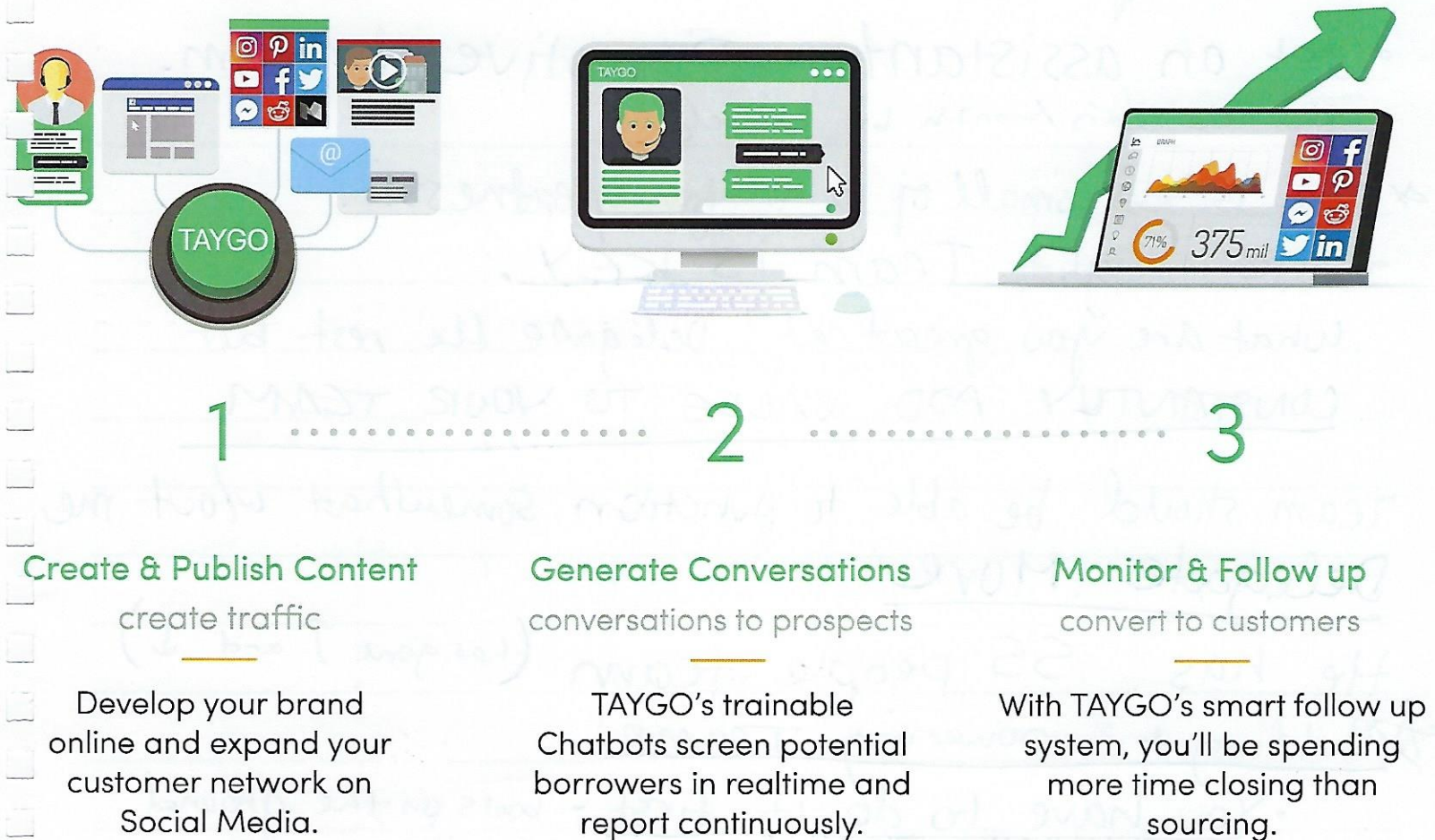
* When reach \$5000 → start deleting...
+ go to Business page

TAYGO

The First All-in-one Online Customer Sourcing Platform for Lenders

Today, most customer centric industries are taking advantage of the Internet and Social Media to access more customers. Mortgage Lenders, however, are yet to tap into such enormous potential for growth. TAYGO recognized this crucial need and went out to build the first all-in-one platform to unleash the power of Digital Marketing for lenders.

HOW IT WORKS?



SESSION: The Career of a Lifetime



TOM RAMIREZ



THOMAS RAMIREZ

\$2 B in funded volume

- Get an assistant. Disruptive for Tom.
Did 100 loans/month by himself...

* One is too small of a # for greatness...

* the Right Team is KEY.

What are you great at? Delegate the rest but

CONSTANTLY ADD VALUE TO YOUR TEAM

Team should be able to function somewhat w/out me

Delegate More

He has 55 people team (has gone ↑ and ↓)

* Building & Empowering Teams:

- You have to do it first - boots on the ground
meeting people, promoting people
share the knowledge
+ keys to success!

game CHANGERS

- Be involved!!! w/ your team
(lead from their side)
- Help team be empowered
- CELEBRATE THEM - ^{culture of it!} celebrating birthdays ^{bc want to...}
- mistakes building team - losing focus of how you got where you are.
ex. Don't forget how to take a 1003
~~eye~~
Ask people how they did it + do it

Discipline around consistency *
don't break the consistency.

Great Operations Manager...

Every day do something that adds value ^{to teams,}
lunch learns, ^{agents,}
^{etc.}

Be in front of your Realtors
Who deserves my praise today?

Knowledge & Value
can't add ~~without~~

Who are you meeting w/ + talking to (Realtors)

Group ^{Me} app - all CDs connected
problems, successes, all on there

SALES MASTERY

TRANSFORM YOUR BUSINESS AND LIFE

One a day - every day "I'm going to get a loan"
* get a loan a day
* put it out there & believe

Cows VS. BuffaloS

↑
away from
storm
they die

↑
head toward the storm & get
THROUGH it!
they live

What does your achievement journal
look like ???

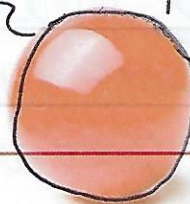
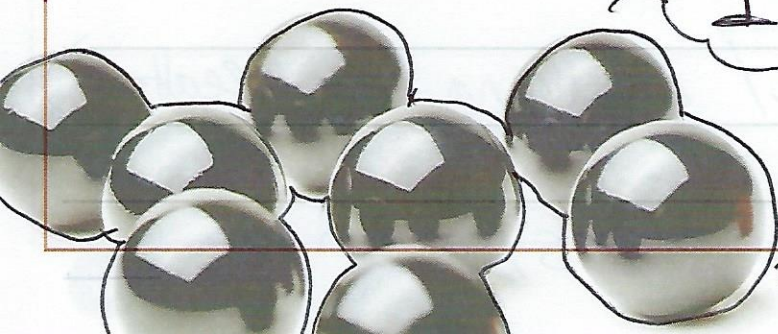
- what does daily achievements look like
- encourage confidence

* Business gets better w/ all these little achievements
- despite hurdles, think about achievements
daily

* Keys to success:

enjoy it, do it, & improve it

* 1% improvement
per day



game CHANGERS

* Add enough value to create desire to
join the team

Operations Staff remotely?

* Processors in house VW remote
everyone under one roof for atmosphere

+ BOND of team

KEY TAKEAWAYS:



Are you Tired of Dragging through Your Day!

Are you Tired of Struggling with Your Weight!

Are you Tired of Being Tired!

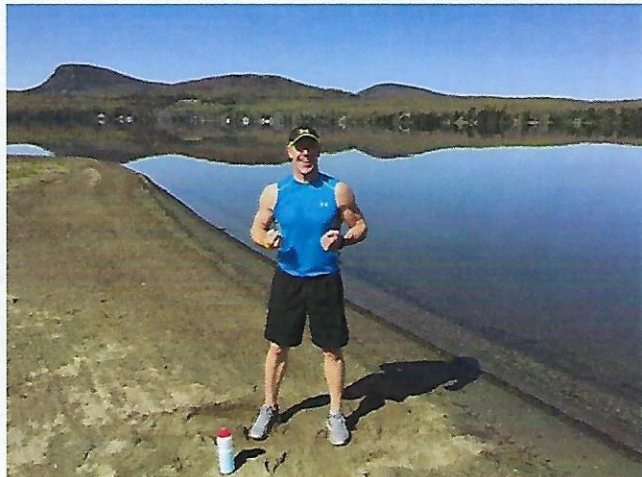
Sales Mastery Keynote Speaker Jonathan Roche (pictured below) knows what it feels like to be too busy to make your health a top priority. He weighed 224 pounds and was wearing size 38 pants when his Dad died suddenly of cardiac arrest.

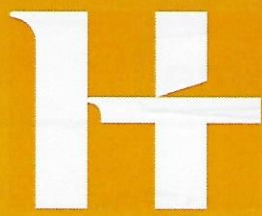
After losing his Dad, Jonathan dropped 44 pounds over the next year and has kept it off for 23 years. He is now an Award-Winning Fitness Expert, Bestselling Author, 12-time Ironman Triathlon Finisher and 23-time Boston Marathon Finisher.

His mission is to help people like his Mom and Dad (who both struggled with their weight) drop weight without dieting so that they can be around to enjoy their kids and grandkids.

Stop by our Booth to join the Drop 30 Lbs. in 10 Weeks Challenge that includes:

- 1) A 12-Month Subscription to www.BootCampHub.com with 25 World-Class Coaches streaming 75 Live Workouts per Week (that are all 30 minutes with no equipment) plus 6,000 Unique Recorded Workouts. *You do the workouts at home so there is no wasting time driving to the gym and many of the workouts are done outside like Jonathan's shown below.***
- 2) The Drop 30 in 10 Guide with 24 Key Habits and the Drop 30 in 10 Scoring System.**
- 3) A Daily Coaching Video from Jonathan to Help You Win the Mental Game.**
- 4) A Signed Copy of Jonathan's 2nd Book ("The 12 Laws of Permanent Weight Loss").**





HIGH TRUST COACHING™



BECKY WALTERS

"As a 36-year seasoned mortgage professional, this year has been a true Reset in my career.

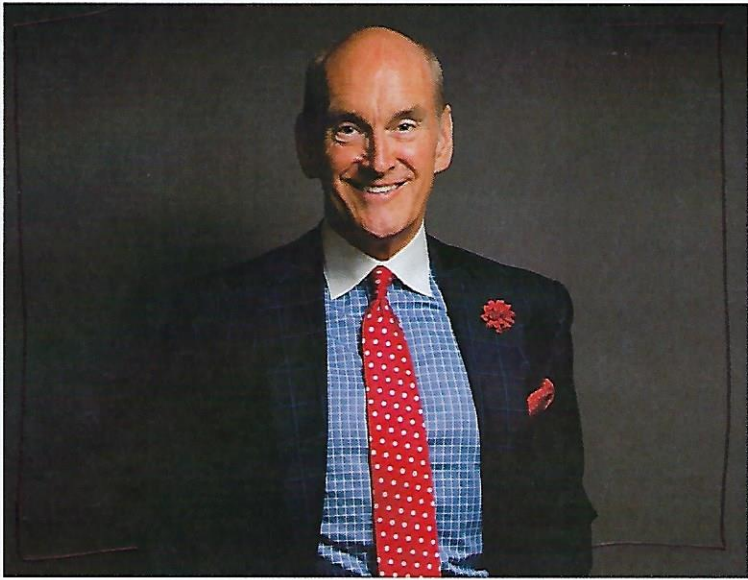
For the first time in 5 years my volume has gone up! With High Trust Coaching, I got back to my "Why", am doing the work I was born to do, and creating a Legacy I am proud of. "

Get A Coach Today!

**LIMITED SPACE AVAILABLE
SIGN UP TODAY**

VISIT: HIGHTRUSTCOACHING.COM

KEYNOTE: The Decision of a Lifetime



TODD DUNCAN

CEO & Co-Founder

POSITIVITY

comfort is the enemy of progress
- Riccardo ☺

this event's appeal...
appeal to emotion, heartfelt, support, same-page, happiness, fun

G - Give ✱ eliminates FEAR ✱
generosity, giver
be a
✱ Don't orient around GETTING, have to worry about being a taker

✱ joy when you are winning the game you are playing

✱ Don't orient around Getting ✱

A - Appreciate

if I GIVE then RECEIVE, must show appreciate

✱ orient around giving

You will Receive

Giving eliminates

FEAR

Don't stop giving

Give + will have plenty

don't ask for business or meetings...

✱ GIVE VALUE ✱

How can I help you win today?

✱ ✱

✱ Don't

worry

about

selling, just GIVING ✱

SIGNATURE → critical words:

Appreciate: "I appreciate YOU"

SHOW your clients, TELL them
Call them + tell them - ^{past clients,} _{realtors}
+ write it to them.

*No one gets tired of hearing they are appreciated. TELL EVERYONE

Look @ all my marketing } Does it show my GIVING + APPRECIATION

measure:

★ design around measured activity that will help you win. Your game will win by design be of these things you measure.

If you don't measure, can't improve, then can't increase winning if →

Need to measure every step + miracles happen!

Must measure where you start!

If you measure every action, WILL WIN

1. Total conversations you have ← ^{current database}
- ★ 2. What % of → triggers loans to processing ← ^{from Referral partners}
3. % of → that go to closing

also measure hourly rate.

Build operational efficacy around volume increase.

Yearly goal doesn't happen ¹²⁷ in a day, happens DAILY

SALES MASTERY

TRANSFORM YOUR BUSINESS AND LIFE

What gets measured, gets improved!!
+ gets easier
can double production w/out doubling labor

★ Enlarge: you have a universe of ppl ★
★ to serve that have been untapped

idea of leads to Referrals by design

people vouching for you

~~just~~ plug into networks / we serve & give value
high endorsement value + trust

★ Easiest business comes from ppl that ♥ you!

5/6 Metrics

1. How many convos w/ database
2. How " " w/ Referral partners
3. what % go to processing
4. what % go to closing
5. How does this reconcile in hourly rate ???

~~you get a ping every day~~

★ INPUT METRICS DAILY

- coaching tip

game CHANGERS

look good + feel good
how you dress, how you feel about
yourself

KEY TAKEAWAYS:

TOP ACTIONS TO TAKE FROM TODAY

1.

2.

3.

4.

5.



TOP ACTIONS TO TAKE FROM TODAY

6.

7.

8.

9.

10.



game CHANGERS

Action Plan

Session Name	Action	Desired Outcome	Deadline	Page #
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				

game CHANGERS

Action Plan

Session Name	Action	Desired Outcome	Deadline	Page #
11.				
12.				
13.				
14.				
15.				
16.				
17.				
18.				
19.				
20.				



HIGH TRUST COACHING™



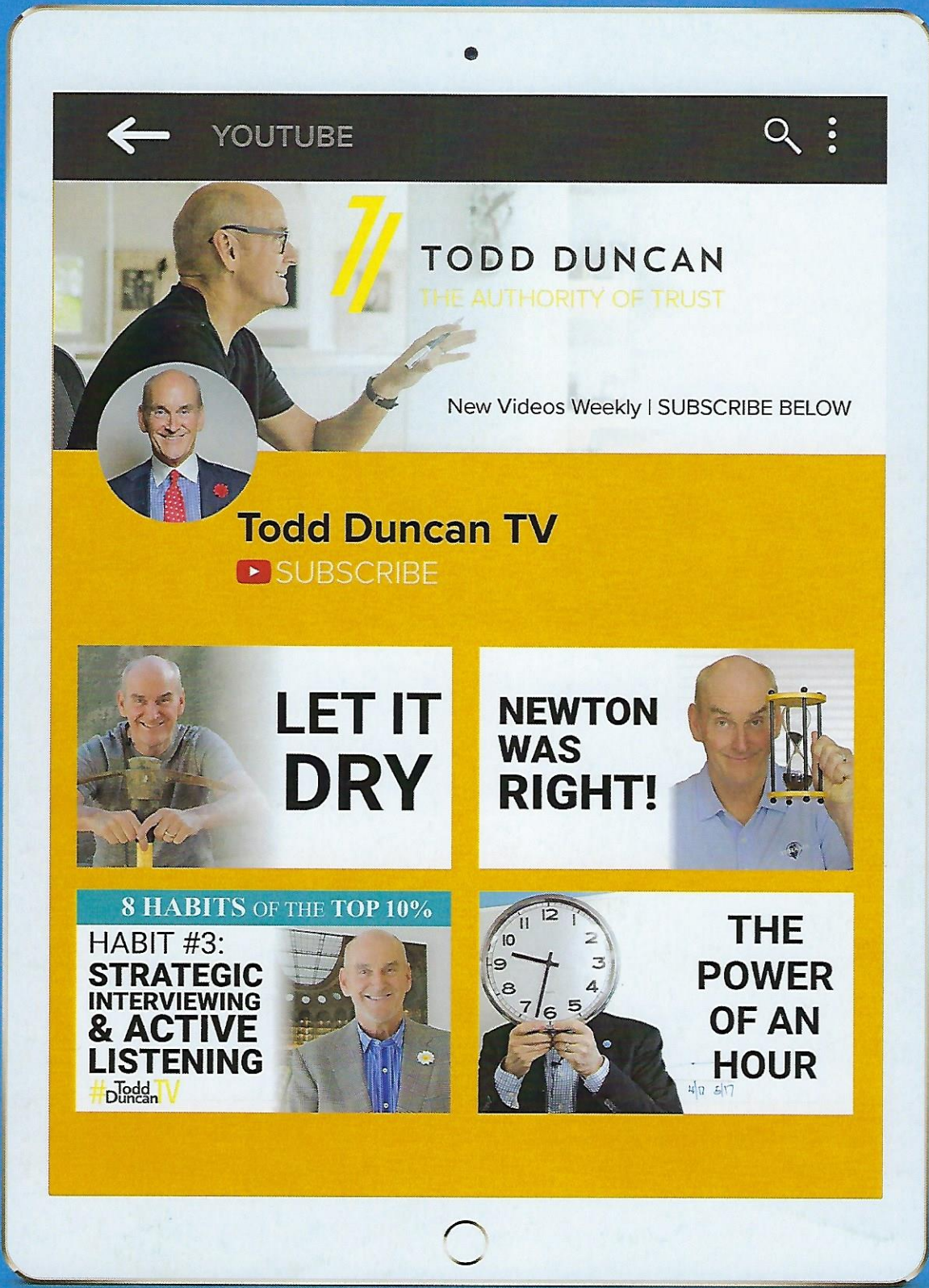
CODY HARDRIDGE

“You have shown me how to unlock the keys to success. I have gone from 100 to over 400 fundings a year in 4 years without increasing my hours. You have impacted my family for generations.”

**Are You Ready To Unlock
Your Potential?**

**LIMITED SPACE AVAILABLE
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