



# 2021 MORTGAGE BUSINESS PLAN

Company: \_\_\_\_\_

This business plan is broken down into simple steps. The first part is a recap of last year with the second part being a forecast or plan for 2021.

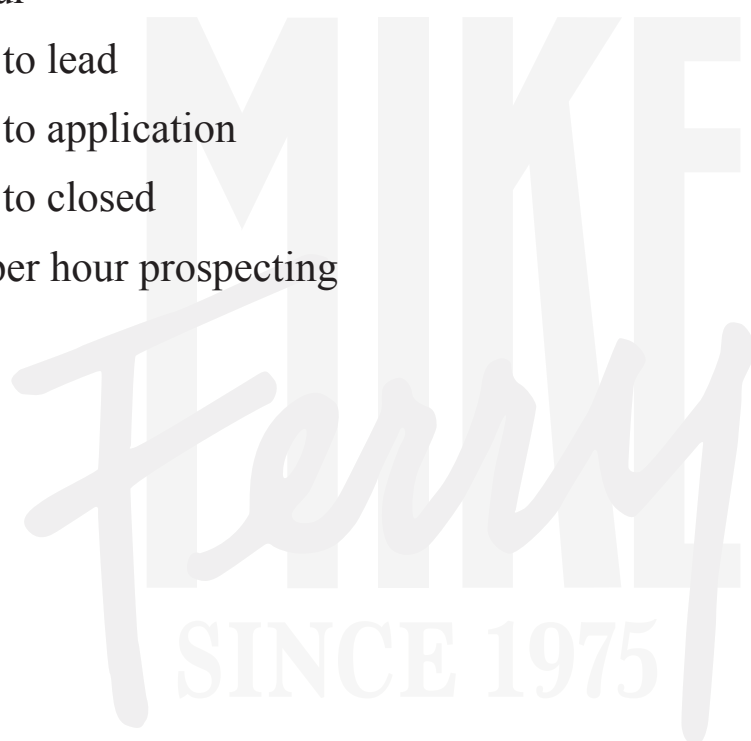
## PART 1 - 2020 BUSINESS RECAPTURE

- Total Contacts \_\_\_\_\_
- Total Leads generated \_\_\_\_\_
- Total applications taken \_\_\_\_\_
- Total applications closed \_\_\_\_\_
- Total applications cancel \_\_\_\_\_
- Total days worked \_\_\_\_\_
- Total applications declined \_\_\_\_\_
- Total applications/REALTORS \_\_\_\_\_
- Total applications/PC \_\_\_\_\_
- Total applications/COI \_\_\_\_\_
- Total applications/Corp. \_\_\_\_\_
- Total applications/Listings/FSBO \_\_\_\_\_
- Total number of purchase \_\_\_\_\_
- Total number of refinance \_\_\_\_\_

Income earned \_\_\_\_\_  
Business expenses \_\_\_\_\_  
Pipeline into 2021 \_\_\_\_\_  
Average loan amount \_\_\_\_\_  
Average commission \_\_\_\_\_

**2020 RATIOS**

Contacts per hour \_\_\_\_\_  
Hrs. prospected to lead \_\_\_\_\_  
Hrs. prospected to application \_\_\_\_\_  
Hrs. prospected to closed \_\_\_\_\_  
Dollars earned per hour prospecting \_\_\_\_\_



## PART 2 - 2021 GOALS

Total contacts	_____
Total leads generated	_____
Total applications taken	_____
Total application closed	_____
Total applications cancel	_____
Total days worked	_____
Total applications declined	_____
Total applications/REALTORS	_____
Total applications/PC	_____
Total applications/COI	_____
Total applications/Corp.	_____
Total applications/Listings/FSBO	_____
Total number of purchase	_____
Total number of refinance	_____
Income earned	_____
Business expenses	_____
Pipeline into 2021	_____
Average loan amount	_____
Average commission	_____

# 1. THE THINGS I HAVE TO DO TO ACCOMPLISH MY GOALS:

*Here we simply list as specifically as possible, those individual things that have to be done to achieve the goals you and your coach have set. (Always include a date for accomplishment)*

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# 2. THE NUMBERS REQUIRED TO ACHIEVE THE 2021 GOAL:

*Here we simply breakdown, starting with the number of closed deals and work backwards. So you want to take the number of closed deals, to the number of applications taken (add 20-25%), all the way to the number of contacts you need to make.*

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