

NMN - 2020 Top Producers Survey

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IMPORTANT: All entries **MUST** be completed by the individual loan officer. Any entry found not to be completed by the individual named will be disqualified. Unless noted, a response is required for all questions.

Information about your 2019 loan production will be used to compile this year's rankings. The entire survey should take approximately 20 minutes to complete (not including preparation time to gather loan data). All submissions must be completed via the online survey.

The Top Producers Survey is open to individual loan officers who work at depository, nonbank and mortgage brokerage firms in the United States.

The deadline for submissions is 6 p.m. EST, Friday, February 21, 2020.

We strongly encourage you to prepare your origination data before beginning the survey. You'll need the following information about your individual 2019 mortgage volume:

1. Exact dollar amount and number of closed mortgages, based on the following loan products: GSE/Conforming (excluding "conforming jumbo"); FHA; VA/USDA; Jumbo (including "conforming jumbo"); Non-QM (excluding jumbo); Other private-label (excluding jumbo and non-QM); HELOCs, home equity loans and other second-liens; reverse mortgages.
2. Purchase and refinance percentages of forward mortgage originations, based on dollar volume
3. High resolution .jpg headshot. Files should be 1MB or larger, and no smaller than 5 inches by 5 inches at 300 dpi. Please make sure the filename contains your first and last name and your company name.

Download a PDF of the required survey information [here](#).

The survey begins with a series of multiple choice questions about recent industry developments and trends, marketing techniques and business practices. The answers you provide to the multiple choice questions will be used in aggregate and will not be used to personally identify you or your company.

There are also three short, open-ended questions intended for loan officers to discuss the strategies behind their success. Responses will be used in future profiles and other content that feature the loan officers and their companies.

The NMN editorial team reserves the right to review or reject any loan officer survey based on incompleteness, inaccurate or unverifiable information, or any other discrepancy that violates the intent or spirit of the Top Producers program.

The survey is optimized to work best on a desktop or laptop computer. Completing the survey with a smartphone or tablet is not recommended. If you need to stop at any time, please click the "Save & Continue Later" button at the bottom right of the screen.

You will receive an on-screen message after you successfully complete your submission, as well as an email to the address provided in the application.

The 2020 Top Producers will be revealed in April online and in NMN magazine. If you have any questions about the 2020 Top Producers program, please email topproducers@sourcemedia.com.

The deadline for submissions is 6 p.m. EST, Friday, February 21, 2020.

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1. Please fill in all information below: *

First Name

Last Name

Your Email Address

Job Title

Company

Your NMLS Nimber *

Company NMLS Number *

Street Address

Suite/Office

City

State

Zip

Phone Number

Company website

(untitled)

2. Please fill out all applicable information below:

Your website:

3. Social media websites:

Facebook

4. Instagram

5. LinkedIn

6. Pinterest

7. Snapchat

8. Twitter

9. Gender *

- ☐ Male
- ☐ Female
- ☐ Decline

(untitled)

10. Age *

11. Years in industry *

12. Years at current company *

(untitled)

13. In which channel(s) of the mortgage industry does your company participate?

Please select all that apply. *

- ☐ Depository
- ☐ Nondepository Mortgage Bank
- ☐ Mortgage Broker
- ☐ Correspondent Aggregator
- ☐ Correspondent Lender
- ☐ Mini-Correspondent
- ☐ Retail
- ☐ Warehouse
- ☐ Wholesale
- ☐ Other (please specify)

*

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14. Does your company service any of the mortgages that it originates?

Please select one. *

- ☐ Yes - Company services loans in-house
- ☐ Yes - Company services loans with a subservicer
- ☐ Yes - Company services some loans in-house and some with a subservicer
- ☐ No - Company does NOT service any of the mortgages it originates

(untitled)

15. Please upload a high resolution .jpg headshot of yourself. Please make sure the filename contains your first and last name and your company name. Files should be 1MB or larger, and no smaller than 5 inches by 5 inches at 300 dpi. *

Browse...

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16. For each of the following, please select all that applied to your company in 2019. *

- ☐ Referrals: real estate agents
- ☐ Referrals: homebuilders
- ☐ Referrals: attorneys or financial planners
- ☐ Referrals: past clients
- ☐ Past client database
- ☐ Lead generation from existing servicing clients (i.e., portfolio defense)
- ☐ Online search advertising (e.g., Google AdWords)
- ☐ Mortgage rate table advertising (e.g., Bankrate, LendingTree, Zillow)
Online co-marketing advertising with real estate agents (e.g., Zillow Premier Agent) Face-to-face meetings at open houses or other live events
- ☐ Organic social media posts
- ☐ Paid social media advertising
- ☐ Affinity marketing programs
- ☐ Live/online consumer seminars

(untitled)

17. Please indicate whether you are more likely to start/increase, not change, or discontinue/decrease each in 2020. *

	Start or increase	No change	Discontinue or decrease
Referrals: real estate agents	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Referrals: homebuilders	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Referrals: attorneys or financial planners	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Referrals: past clients	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Past client database	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lead generation from existing servicing clients (i.e., portfolio defense)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Online search advertising (e.g., Google AdWords)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mortgage rate table advertising (e.g., Bankrate, LendingTree, Zillow) Online co-marketing advertising with real estate agents (e.g., Zillow Premier Agent) Face-to-face meetings at open houses or other live events	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Organic social media posts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Paid social media advertising	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Affinity marketing programs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Live/online consumer seminars	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

(untitled)

18. Please select all that applied to your company in 2019 *

- ☐ Facebook
- ☐ Instagram
- ☐ LinkedIn
- ☐ Pinterest
- ☐ Snapchat
- ☐ Twitter
- ☐ Yelp
- ☐ Zillow loan officer reviews
- ☐ None of the above

(untitled)

19. Please indicate whether you are more likely to start/increase, not change, or discontinue/decrease each in 2020. *

	Start or Increase	No change	Discontinue or Decrease
Facebook	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Instagram	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
LinkedIn	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pinterest	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Snapchat	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Twitter	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Yelp	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Zillow loan officer reviews	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

(untitled)

20. Please indicate the importance of each of the following to your own individual origination goals in 2020:

Loan products: *

	0 - Not applicable	1 - Not at all important	2	3	4 - Neutral	5	6	7 - Extremely important
GSE/Conforming (excluding "conforming jumbo") FHA	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
VA/USDA	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Jumbo	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Non-QM (excluding jumbo)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other private-label (excluding jumbo and non-QM) Home equity loans, HELOCs and other second-liens Reverse	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Low down payment mortgages	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cash-out refinancing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

(untitled)

21. Please indicate the importance of each of the following to your own individual origination goals in 2020:

Customer segments: *

	0 - Not applicable	1 - Not at all important	2	3	4 - Neutral	5	6	7 - Extremely important
First-time homebuyers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Move-up homebuyers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Move-down homebuyers (e.g., seniors, empty-nesters)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Refinance borrowers								

(untitled)

22. Please indicate your agreement or disagreement with each of the following statements:

Your opinions about the mortgage industry and your business: *

	1 - Completely disagree	2	3	4 - Neither agree nor disagree	5	6	7 - Completely agree
The housing market is headed in the right direction	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The overall economy is headed in the right direction	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Underwriting standards are too strict	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My company meets or exceeds my technology expectations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My company meets or exceeds borrowers' technology expectations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My company is taking the right steps to promote diversity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
It is a good time to work in the mortgage industry	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I plan to find a new job within the mortgage industry in 2020	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I plan to find a new job outside the mortgage industry in 2020	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Regulatory reforms have made it easier to do my job	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

(untitled)

23. Please indicate your level of concern about each of the following:

Your concerns about factors negatively affecting your business in 2020 *

	1 - Not concerned	2	3	4 - Neutral	5	6	7 - Very concerned
Housing inventory shortages for first-time homebuyers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Housing inventory shortages for moveup homebuyers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Refinance mortgage volume	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Rising mortgage interest rates	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Rising home prices	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lender consolidation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Job security at your current company	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Competition from mortgage brokers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Regulatory compliance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Uncertainty surrounding GSE reform and the future of Fannie Mae and Freddie Mac	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

(untitled)

24. Answers to the following questions will be published and used to feature the accomplishments and successes of individual loan officers in the Top Producers Rankings. Please limit your responses to each question to 150 words or less.

How is AI affecting the way you work right now? *

25. What consumer need is the mortgage industry not addressing right now? What has to happen to change that? *

26. When speaking to a customer for the first time, what are you doing to move the discussion beyond what is the rate for a 30-year mortgage? *

27. Please provide your individual loan origination volume, in both exact dollar amount and number of loans. Provide a whole number for each entry with no commas or dollar signs. These figures should include all mortgages that closed during the 2019 calendar year.

Leave non-applicable items blank.

	\$ Volume	Number of loans
GSE/conforming (excluding "conforming jumbo")	<input type="text"/>	<input type="text"/>
FHA	<input type="text"/>	<input type="text"/>
VA/USDA	<input type="text"/>	<input type="text"/>
Jumbo (including "conforming jumbo")	<input type="text"/>	<input type="text"/>
Non-QM (excluding jumbo)	<input type="text"/>	<input type="text"/>
Other private-label (excluding jumbo and non-QM)	<input type="text"/>	<input type="text"/>
Home equity loans, HELOCs and other second-liens	<input type="text"/>	<input type="text"/>
Reverse	<input type="text"/>	<input type="text"/>
Total Sum	<input type="text"/>	<input type="text"/>

Please check that the total sum for \$ Volume and Number of loans columns are correct,

(untitled)

28. Please provide the name, email and phone number of an executive at your company that can confirm your origination volume. *

First Name

Last Name

Email Address

Phone Number

(untitled)

29. Purchase and refinance percentages of your forward mortgage originations

Purchase (%) *

30. Refinance (%) *

Thank You!

Thank you for your submission!

The 2020 Top Producers will be revealed in April online and in NMN magazine. If you have any questions about the 2020 Top Producers program, please email topproducers@sourcemedia.com.