



# M.A.P

## Mortgage Advantage Program

- ▶ ***Mortgage Advantage Program*** is a different approach to financing your most valuable asset.
- ▶ **Discovery**: Understanding your unique mortgage and financial goals.
- ▶ **Planning**: Matching a specific mortgage with your financial goals and helping you construct a plan as needed.
- ▶ **Execute**: Implementing your developed plan and monitoring it every 6 months for continued success.

# Discovery

- ▶ Do you want this type of advice?
- ▶ Do you have a vision for your financial future?
- ▶ What is your current financial situation?
- ▶ Does it match your long-term vision?
- ▶ What are the steps to achieving this goal?
- ▶ Analyzing your situation and answering a financial questionnaire?

# Planning

- ▶ Establishing and writing down your vision.
- ▶ Reviewing current credit, income, debt and assets to help establish proper expectations.
- ▶ Taking your financial goals and matching them with the appropriate professional.
- ▶ Matching your mortgage loan, rate and payment to your long and short term goals.
- ▶ Making sure all party's understand goal.

# Execute

- ▶ Establishing your action plans.
- ▶ Organizing one location to track your assets(Quicken or excel).
- ▶ Tracking progress( Quicken).
- ▶ Communicating every quarter.
- ▶ Staying focused and disciplined.

# Conclusion

- ▶ I am very passionate about my clients and their financial stability. Every client has different goals and objectives. I am not a financial advisor or do I sell financial products. My job is to help my clients **Discover, Plan** and **Execute** there financial goals and dreams.