

LOAN OFFICER BUSINESS PLAN

Name: _____

Year: _____

Year _____

Units	Volume	Comp Plan	Avg Loan \$	Income	#Ref. Ptnrs	# Staff

Year _____

Units	Volume	Comp Plan	Avg Loan \$	Income	#Ref. Ptnrs	# Staff

Goals

TOP 5 Business GOALS		TOP 5 Personal GOALS	
1.		1.	
2.		2.	
3.		3.	
4.		4.	
5.		5.	

Activites

TOP 3 Activities for Q-1		TOP 3 Activities for Q-2	
1.		1.	
2.		2.	
3.		3.	

TOP 3 Activities for Q-3		TOP 3 Activities for Q-4	
1.		1.	
2.		2.	
3.		3.	

LOAN OFFICER BUSINESS PLAN

Non-Negotiables in My Schedule

WEEKLY	MONTHLY

My Schedule

MONDAY - THURSDAY	
8 - 9 ^{am}	
9 - 11 ^{am}	
11 - 2 ^{pm}	
2 - 4 ^{pm}	
4 - 5 ^{pm}	

FRIDAY	
8 - 9 ^{am}	
9 - 12 ^{pm}	
Noon:	OFF

Development

Skill(s) To Develop:	
One Technology To Implement:	
One Thing To Stop Doing:	



MORTGAGE
MARKETING
ANIMALS