

Partner Calls:

☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐

Lead | Client Calls

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Referrals | From Calls

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DAILY ACTIVITIES

☐ Partner Calls

☐ Lead | Client Calls

☐ Consultations

☐ Live Meetings

☐ Annual Reviews

☐ On Time

DAILY RESULTS

☐ Leads

☐ Applications

☐ Sent to Processing

☐ Locked Loans

☐ Funded Loans

☐ 6 | 1 | 6 | 1 | Added to Calendar

Today Was:

☐ PROACTIVE

☐ REACTIVE

Completed:

☐ BEFORE | Noon

☐ AFTER | Noon