

LOA Weekly Checklist

Use this checklist to track your activity within Total Expert

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| Daily | <ul style="list-style-type: none"><input type="checkbox"/> Monitor Pre-Approval / Pre-Approval Expiration FV<input type="checkbox"/> Complete outstanding tasks |
| Monday | <ul style="list-style-type: none"><input type="checkbox"/> Schedule 2-3 social media posts for your loan officer for the week or month |
| Tuesday | <ul style="list-style-type: none"><input type="checkbox"/> Make weekly loan status update calls |
| Wednesday | <ul style="list-style-type: none"><input type="checkbox"/> Prospect agents from recent transactions<input type="checkbox"/> Send Co-marketing invitations |
| Thursday | <ul style="list-style-type: none"><input type="checkbox"/> Reach out to connected agents asking them if they have any open houses coming up or new listings. |
| Friday | <ul style="list-style-type: none"><input type="checkbox"/> Create marketing kit for new listings upon request |