

School of Loan Origination Workshop Agenda

Jacksonville, FL

January 18-19, 2018

Day 1 Agenda

8:30 – 10:00 a.m.	Taking a complete 1003
10:00 – 10:15 a.m.	<i>Morning Break</i>
10:15 – 12:00 p.m.	Analyzing Credit Reports
12:00 – 12:45 p.m.	<i>Lunch</i>
12:45 – 1:45 p.m.	Evaluation the 1003 - Loan Options
1:45 – 2:30 p.m.	Supporting Documentation
2:30 – 2:45 p.m.	<i>Afternoon Break</i>
2:45 – 3:30 p.m.	Assignment – Supporting Documentation
3:00 – 4:00 p.m.	Non-traditional Products
4:00 – 4:05 p.m.	<i>5-min Break</i>
4:05 – 4:50 p.m.	Assignment – Non-traditional Products
4:50 – 5:00 p.m.	Wrap up

Day 2 Agenda

8:30 – 10:00 a.m.	Value and Challenges of Purchases
10:00 – 10:15 a.m.	<i>Morning Break</i>
10:15 – 11:00 a.m.	TRID Compliance
11:00 – 11:05 a.m.	<i>5-min Break</i>
11:05 – 12:00 p.m.	Assignment - TRID
12:00 – 12:45 p.m.	<i>Lunch</i>
12:45 – 1:45 p.m.	Product Guidelines and Selection
1:45 – 3:00 p.m.	Managing a Pipeline
3:00 – 3:15 p.m.	<i>Afternoon Break</i>
3:15 – 4:00 p.m.	Marketing a Pipeline
4:00 – 5:00 p.m.	Marketing in a Purchase Environment