

A STUDY OF THE MARKETPLACE

The purpose of this study is to strengthen the interpersonal relationships between real estate professionals and those who partner with them to serve their clients. This study will survey hand-picked local realtors on their opinions and feedback on working with mortgage brokers and mortgage bankers.

Blue Adobe Mortgage would like to thank you in advance for taking a few moments to complete this questionnaire. The information that is gathered from this study will be used as a decision making tool so that Blue Adobe Mortgage may better serve the realtor community and the home buyers of the Central Coast.



WE WANT TO KNOW WHAT YOU THINK...

1 How important is the lender you suggest to your client?

- Equal partner in your client transactions
- Important
- Never suggest a lender but hope client chooses a good one
- Doesn't matter that much, most lenders are the same

2 What is most important to you when helping your client select a lender: On a scale of 1-10, 1 being most important

- Length in the business
- Product knowledge
- Enthusiasm for their work
- Rates and fees
- Company affiliation
- Resourcefulness
- Range of products
- Support team
- Communication

3 Does your current suggested lender -

- Exceed your client needs
- Meet your client needs
- Need improvement

4 What qualities do you like most about your current suggested lender?

- A _____
- B _____
- C _____
- D _____

5 What qualities do you like least about your current suggested lender?

- A _____
- B _____
- C _____
- D _____

6 Do you feel you are kept informed during the entire purchase transaction?

- Yes No

7 How often would you like to hear from your suggested lender while working with your client?

- When loan status changes, ie: approvals, denials, or when loan documents are ordered
- Everyday
- Once per week
- Twice per week
- Only on Tuesdays

8 What other times during the transaction would be helpful to hear from your suggested lender?

- A _____
- B _____
- C _____
- D _____

9 Who do you currently suggest to your clients for their lending needs?

- Mortgage broker
- Institutional banker
- Mortgage broker/ Mortgage banker

10 Have you ever worked with Blue Adobe Mortgage before?

- Yes No

If yes, what was your experience?

- Excellent Good
- Average Poor

11 Would you please share additional comments on Blue Adobe Mortgage?

12 What kind of information or materials would be helpful to you?

- Rate Sheets/Market Conditions
- New Products
- Confirming Limit Changes

Other _____
