



## STRATEGY NAME

# Broker Search by Last Name

Understanding a candidate's book of business is a crucial part of the vetting process. MMI's Broker Search tool streamlines the evaluation of a broker's loan history and performance.

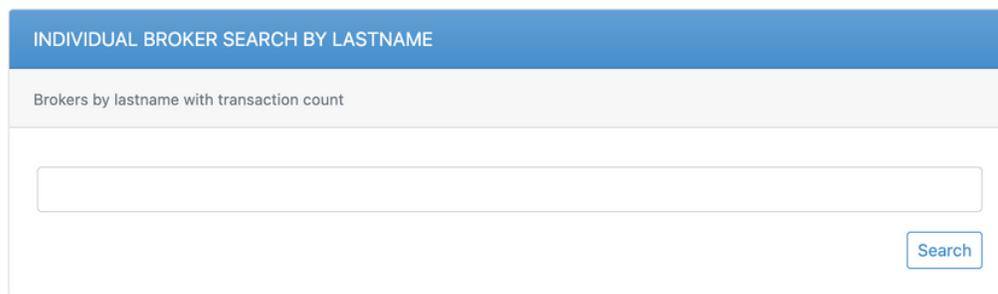
## SUMMARY

### ■ What is it?

Reviewing a Broker or Loan Officer's transaction history to verify self-reported data accuracy and assess fit with your company's candidate criteria.

### ■ Where do you find it?

Navigate to Mortgage > Wholesale > Individual Broker Search by Last Name.



### ■ How do I do it?

Enter a known Broker/LO's last name to access their detailed Fast Fact profile.

### ■ When should you take action?

When you are looking to deep dive into the details of a specific candidate.

### ■ What if I do/don't do this?

Verifying a broker's transaction history enables smarter hiring decisions. Without this transparency, you risk working with the wrong people by relying on inaccurate references or self-reported details.

## NEXT STEPS

- Locate a Broker by last name.
- Review their transaction history, production trends, and the breakdown of their brokered transactions by state.
- Add them to your prospect list or favorites by clicking this icon: 
- Rinse & repeat – Continue adding potential candidates.



## STRATEGY NAME

# Broker Search by Rank

Expand your broker search to find top talent that can offer more business opportunities. MMI's Broker Rank tool simplifies research, helping you identify the best fit for your needs.

## SUMMARY

### ■ What is it?

A snapshot of the business a broker/LO has done over the past 14 months.

### ■ Where do you find it?

Mortgage > Wholesale > Broker Search by Rank.

The screenshot shows the MMI Broker Search by Rank tool interface. On the left is a navigation menu with options: MORTGAGE, DASHBOARDS, REFINANCE, LENDER COMPANIES, LENDER OFFICES, WHOLESAL Beta, ORGANIZATION, COMPANY RE AGENT WALLET SHARE, INSIGHTS, LEND CO SEARCH BY MAP, LO RANK, LO SEARCH, and LO FAVORITES. The main content area is titled 'INDIVIDUAL BROKER RANK BY COUNTY/CITY/VOLUME/ZIP'. It includes a 'Broker rank by filters' section with dropdowns for 'Time Frame' (set to 14 Months), 'Location Filter' (set to Alabama), and 'Narrow by County or Zip'. Below this is a section titled 'TOP WHOLESAL LENDERS/BROKERS' with a sub-header 'Top wholesale lenders/brokers by transaction count' and three buttons: 'TOP LENDERS', 'TOP 2500 BROKERS', and 'TOP 2500 NON QM BROKERS'.



### ■ How do I do it?

Customize your search query to fit your needs by including factors such as volume, county, and more.

### ■ When should you take action?

Take action daily; MMI offers regular updates with the latest transaction data.

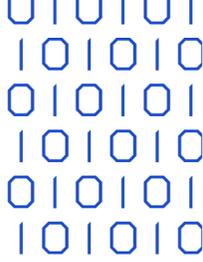
### ■ What if I do/don't do this?

If you proceed, you'll broaden your pipeline and unlock more business opportunities; if not, you'll miss out on potential new business opportunities from top brokers.

## NEXT STEPS

- Define your search criteria based on volume and loan types.
- Review brokers and select the Fast Facts Profile for more details.
- Once satisfied, add brokers to your favorites list and prospect further.
- Rinse & repeat – Continually expand your list of potential candidates.

[Watch how-to video](#)



## STRATEGY NAME

# Broker Search by Lender Name

Understand the brokers working with your main competitors, evaluate their wallet share, and identify those with potential for a committed partnership.

## SUMMARY

### ■ What is it?

It refers to the ability to find LO's brokering to specific companies.

### ■ Where do you find it?

Mortgage tab > Wholesale > Wholesale Lender Wildcard Search.

### ■ How do I do it?

Enter a company's name in the search bar. Click on the lender's name to see which LOs have brokered business with the company you're looking into.

### ■ When should you take action?

Take action every day; MMI provides the latest transaction data to keep you informed.

### ■ What if I do/don't do this?

Using MMI's Wholesale lender office search regularly provides valuable insights for discussions with candidates. Not using it may result in missing important details about preferred candidates.

## NEXT STEPS

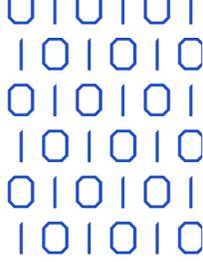
- Find brokers working for other lenders via the Wildcard search.
- Evaluate their wallet share. Is there room for you to earn a spot as their choice wholesale lender partner?

The screenshot shows the 'Wholesale Lender Search' interface. The search criteria are 'mortgage' and 'Approximate \$ SUM 14 Mo'. The selected company is 'LENNAR MORTGAGE LLC' with ID '59100' and '21381177700'. The table below lists brokers and their associated data:

Name	Company	Transaction	LO Total Transactions	Volume	LO Total Volume
Robert Simmons	Nationstar Mortgage LLC	1	119	\$318,672	\$37,894,909
MATTHEW FLORES	Secure Choice Lending	1	4	\$494,000	\$1,784,169
Hernan Garcia	Oakdale Mortgage LLC	2	382	\$570,566	\$103,385,943
Lee Becton	GVC Mortgage, Inc.	1	11	\$369,189	\$3,346,062
Jose Gutierrez	Home Access Financial, ...	1	1	\$464,432	\$464,432
Mark Principi	Central Lending Service...	1	40	\$335,204	\$15,454,763

- Explore their Fast Facts profile. If the broker is a good fit for what you're looking for, add them to your prospect list.
- Keep building your prospect list and start importing them to your CRM via webhook.

[Watch how-to video](#)



## STRATEGY NAME

# View Top 2500 Brokers

Explore the top 2,500 brokers with comprehensive reports covering QM and Non-QM categories.

## SUMMARY

### ■ What is it?

A quick method to generate a list of the top 2,500 QM and non-QM brokers. Identify ideal candidates based on in-house versus brokered business percentages.

### ■ Where do you find it?

Mortgage > Wholesale > Top Wholesale Lenders/Brokers > Top 2500 Brokers / Top 2500 Non QM Brokers

### ■ How do I do it?

Sort the lists according to your needs and dig into Fast Fact profiles from the pre-built reports.

Broker	State	Company	Brokered Transactions	Lender Count	In House %	Brokered %
TREVOR BARRETT	AZ	Barrett Financial Group, L.L.C.	372	48	96.28%	3.72%
AMEER KATIFI	CA	Trusted Mortgage Capital Inc	113	12	98.87%	1.13%
THUAN NGUYEN	CA	Loan Factory, Inc.	774	30	92.26%	7.74%
BRIAN COOKE	CA	SunnyHill Financial, Inc.	331	8	96.69%	3.31%
JULIAN KAVUKCU	MI	Swift Home Loans, Inc.	241	4	97.59%	2.41%
MARK COHEN	CA	Cohen, Mark Howard	984	8	90.16%	9.84%
BIJU PAUL	TX	Prime Choice Lending Inc.	219	6	97.81%	2.19%
YOJANA SANGU	TX	ENSURE HOME LOANS LLC	717	17	92.83%	7.17%
MARTIN MEDVE	FL	Trident Home Loans, LLC	103	4	98.97%	1.03%
LYSA GRIFFITH	WA	OriginPoint LLC	211	7	97.89%	2.11%
CHARLES KEMEN	MI	Swift Home Loans, Inc.	189	4	98.11%	1.89%
TAMMY SAUL	MD	Federal Hill Mortgage Company, LLC	504	21	94.96%	5.04%
JOEL MATHEW	TX	Champions Lending LLC	331	23	96.69%	3.31%

### ■ When should you take action?

Today! Check in weekly to keep track of rank updates.

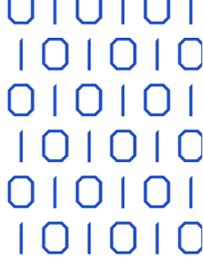
### ■ What if I do/don't do this?

Using MMI to find top brokers by in-house versus brokered business allows for deeper profile analysis. Not using the tool risks missing out on opportunities from top producers.

## NEXT STEPS

- View the list of the top 2,500 brokers, and sort the columns to find ideal candidates who fit your criteria.
- Find brokers who conduct more brokered business than in-house deals with a high number of lender partners. They are more likely to be open to giving you their business.
- Add them to your prospect list in MMI, and push them into your CRM to start nurturing a solid partnership with them.

[Watch how-to video](#)



## STRATEGY NAME

# View Top 2500 Lenders

Discover which brokers are working with the top 2,500 lenders based on transaction volume from the past 14 months.

## SUMMARY

### ■ What is it?

A quick method to generate a list of the top 2,500 wholesale lenders and the brokers they work with, including shared transaction count and volume.

### ■ Where do you find it?

Mortgage > Wholesale > Top Wholesale Lenders/Brokers > Top 2500 Lenders

### ■ How do I do it?

Click the arrow (>) next to the number of brokers a company is working with. Sort and filter the list according to your needs. Once you've narrowed down your list, click the broker's name to dig into their Fast Fact profiles and determine if they're a good candidate.

Name	Company	Transaction	LO Total Transactions	Volume	LO Total Volume
Curtis Hayunga	Heartland Mortgage Inc.	2	12	\$20,000	\$2,553,453
Dennis Quaranta	Funding Resources LLC	5	6	\$993,000	\$2,036,025
Adriana Combie	NEXA Mortgage, LLC	6	9	\$1,546,145	\$2,252,745
Curtis White	NEXA Mortgage, LLC	2	5	\$582,275	\$1,284,985
Jerome Miller	Prime Rate Lending Group Inc	1	1	\$277,874	\$523,345
Hannah Payne	Atlantic Bay Mortgage Group,...	5	100	\$1,225,150	\$21,991,302
ROCKET MORTGAGE LLC		>	9035		56886
PENNYMAC LOAN SERVICES LLC		>	4476		16180

### ■ When should you take action?

Today! Check in weekly to keep track of brokers added to a company's list.

### ■ What if I do/don't do this?

Finding top brokers doing business with the top 2,500 lenders gives you a great list of prospects who you can market to as a better partner to earn more business. Not using the tool risks missing out on opportunities from top producers.

## NEXT STEPS

- Search for the top 2500 lenders, check the number of brokers they collaborate with, and identify loan officers (LOs) who have more total transactions than brokered ones with said lender.
- Add them to your prospect list.

## STRATEGY NAME

# Prospect Lists & LO Favorites

To maintain a strong pipeline, compile prospect lists and favorite Brokers/LOs in MMI by clicking the star icon. You can later add these favorites to your Prospect List for easier contact management.

## SUMMARY

### ■ What is it?

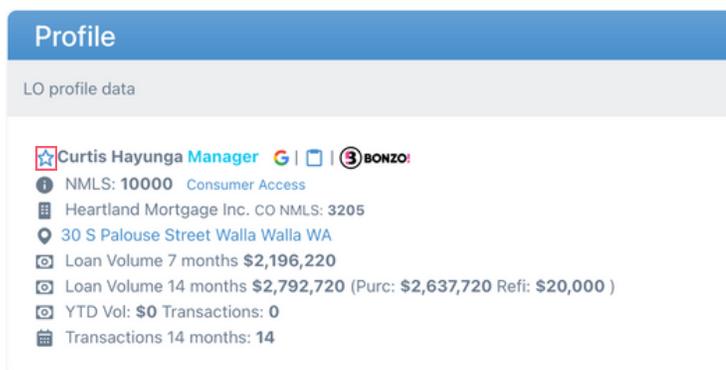
This strategy effectively adds and monitors candidates before integrating them into your CRM.

### ■ Where do you find it?

Next to any LO's name on their Fast Fact profile.

### ■ How do I do it?

To track a Broker/LO, navigate to their Fast Facts Profile and click the star icon ☆ next to their name to add them to your favorites list.



### ■ When should you take action?

Take action when researching or engaging with a potential new Broker partner who meets your needs and you want to track their activity.

### ■ What if I do/don't do this?

If you add your favorites to this folder then you will continue to always have a working list of potential partners.

## NEXT STEPS

- Use MMI's wholesale search tools to find Broker candidates that fit your criteria.
- Click the star next to the name of suitable candidates.
- Once your CRM is integrated with MMI, go to your prospect list and either export the list or push it straight into your marketing campaigns.
- Rinse & repeat to build your prospect lists.

**Watch how-to video** 7



# Integrate Your CRM

Connecting your CRM into MMI's database can help streamline your daily workflow and automate outreach efforts.

## SUMMARY

### ■ What is it?

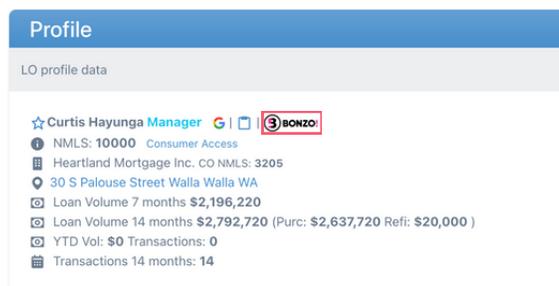
MMI integrates with most CRMs via a webhook, allowing direct transfer of contact information while viewing a candidate's profile.

### ■ Who is it for?

This is for individuals looking to identify prospect brokers/LOs and find contact information so they can use their CRM to nurture relationships with email and SMS text automated campaigns.

### ■ Where do you find it?

Once the webhook is set up, you can find it on any brokers'/LOs' Fast Fact Profile page, indicated by a green icon next to an LO's name, or the Bonzo icon if you are a Bonzo user.



### ■ How do I do it?

Set up the webhook. To add data to your CRM, click the "Add to CRM" button. A confirmation window will appear. Verify the information, then start the webhook process configured by you or your IT team to push the data into your CRM.

### ■ When should you take action?

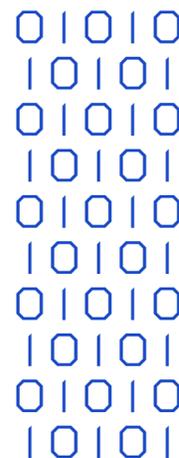
Take action when you identify a prospect you would like to market yourself to.

### ■ What if I do/don't do this?

Using this tool linked to your CRM allows for quick candidate addition to campaigns. If you choose not to use it, you'll likely face more manual tasks when transferring contacts into your CRM.

## NEXT STEPS

- If your webhook is set up, prepare an automated campaign in your CRM.
- Use rule logic for enrollment based on metrics like PPS score for effective messaging.
- Rinse & repeat with every prospect broker/LO.



# Visual Intelligence Dashboards

Our Visual Intelligence Dashboards provide insights into market trends and positioning from funding lender data.

## SUMMARY

■ **What is it?**

Visual data sets offer flexible filters for a more detailed search.

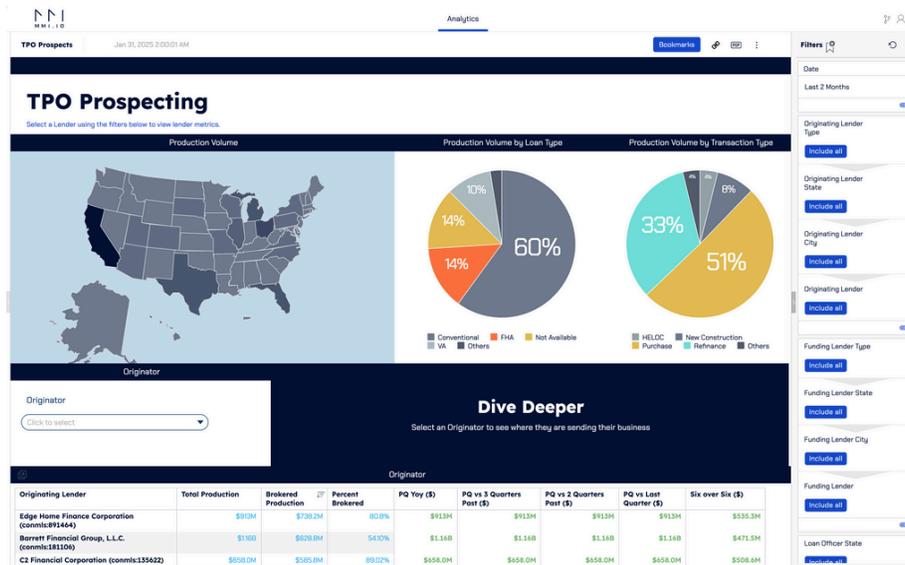
■ **Where do you find it?**

1.0: Homepage menu > Dashboards > My Dashboards > Live Dashboards > TPO & Wholesale.

1.5: Left-side menu > Dashboards > Live Dashboards > TPO & Wholesale.

■ **How do I do it?**

Click on any of the boards in the TPO & Wholesale folder. Review TPO lender details, identify prospects for marketing outreach, and analyze brokered transaction information.



■ **When should you take action?**

Take action when researching or reaching out to a broker partner that fits your needs and you want to pursue further discussions.

■ **What if I do/don't do this?**

Using MMI for analyzing supplementary data sets can enhance insights into your organization's market position, improve understanding of the competition, and allow for a deeper look into broker operations, including funding lenders and other details.

## NEXT STEPS

- Link Visual Intelligence Dashboards to your primary MMI account.
- Use filters to create saved bookmarks and reports.
- Rinse & Repeat – Continue adding candidates to your CRM.

