

Say "Hello" to Your New Mortgage CRM

Enjoy Polished Marketing Content, Spectacular Sales Tools & So Much More

Marketing

- Email
- SMS
- Landing Pages
- Lead Forms
- Facebook Integration
- Dynamic Videos
- Interactive Tools & Games
- Dynamic Marketing Automation
- Flyers
- Surveys
- Partner Co-Branding

Administration

- LOS Integration
- Enhanced Workflows
- MS Exchange Sync
- Zapier Integration
- Zendesk Support
- Data Uploader
- SSO
- Custom Rules
- Tags & Labels
- Custom Fields

Sales

- Single Property Sites
- Online Loan Calculators
- Lead Scoring/Lead Management
- Calendars & Tasks

Management

- Content Approval Manager
- Configurable Roles & Permissions
- Reporting and Dashboards



Schedule
a demo at
topofmind.com



Triple Your Calls, Triple Your Sales.

Contact, connect and close more deals with a customizable dialer.

NEW! Surefire Power Calls

- Spin up and call an entire list of people one after another, automatically.
- Leave a pre-recorded voicemail while next call dials, no waiting.
- Integrated with Surefire CRM — auto dial and track your leads.

Tools to Help Close More Sales

- Pre-written or customizable scripts — easy to record and drop to voicemail.
- Use your own phone number or use the prospect's local area code.
- Segment and filter contacts for customized messaging.

Whether you're cold calling prospects or checking in with your client base, Surefire has the tools, support and resources needed to hone your skills and help you generate more sales.

Email help@topofmind.com for a special introductory pricing quote!



Systems Integrations

Meet our growing family of supported integration partners.

We work to understand your data sharing needs, and identify ways to simplify processes and avoid unnecessary costs. Open APIs are included in your subscription and open to developers.

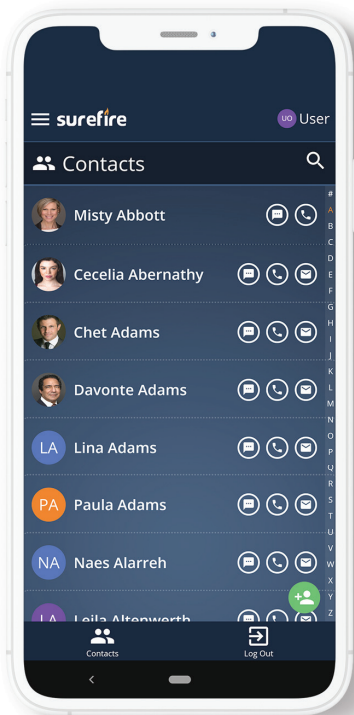


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Anywhere you work, any way you work

Never miss an opportunity with CRM on the go.



NEW! Surefire Mobile Experience

- Access and manage your entire Surefire contact list.
- Call, text or email directly from the interface.
- Easily add notes
- Share a contact
- Initiate and continue marketing automation.

Easy access – no app store needed

- From your iOS or Android device, go to mobile.surefirecrm.com and login using your Surefire user name and password.
- A shortcut will be added to your home screen.

From your mobile device go to mobile.surefirecrm.com



Surefire makes mining your database easy!

With Surefire Rate Alerts, we notify you whenever your past clients could benefit from refinancing! No need to remember every loan you've closed for your clients and what their rate was at time of closing.

Key Features

- Searches your contact records daily for refinance opportunities
- No need to remember each loan you've closed and the rate at the time of closing
- Notifies via email or Surefire notifications
- Helps you close more deals
- Helps your clients save money

Email help@topofmind.com to learn more



ENGAGE PROSPECTS WITH MULTICHANNEL MARKETING

Market and communicate over SMS & Social as well as with traditional Email

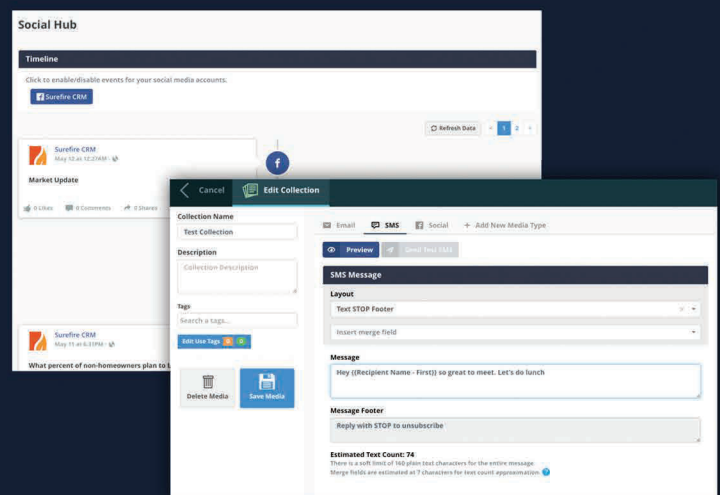
Key Features

Sales & Marketing

- Send themed SMS, Social and Email simultaneously using Content Collections
- Schedule future posts & sends
- Set up recurring deployments at any time interval
- Link multiple Facebook accounts
- Automate SMS messages to contacts
- Sign up for multiple SMS numbers

Compliance & Management

- Post for yourself or pages you manage
- Create approved content for team to use
- Control what content users can access
- Fully compliant automatic SMS opt out settings



Create, schedule and send email, SMS and social content to your network.





382 W. Amity Rd., Rye, NY 10528

DESCRIPTION

This stunning modern yet traditional home offers flexibility with a separately metered two-bedroom ADU that is ripe for extra cash flow. The use of space both inside & out is refreshing. Each unit has its own outdoor area. The home boasts polished concrete and cork floors; Pentel Quartz countertops, and heated bathroom floors.



Square Feet
2580



Bedrooms
5



Year Built
2017



Bathrooms
5

CREATE DYNAMIC OPEN HOUSE SITES IN MINUTES

Use property MLS IDs to autogenerate single property sites for open houses with your real estate partners

AREA DETAILS

Click on the icons below to check out facts and figures about the surrounding area.

Rent vs. Own
The concentration of renters in a neighborhood can impact property values.

Commute
A city neighborhood may mean less time in traffic, but more time in the city.

Income
Average area income can offer an indication of the value of neighborhood homes.

People
It's not just the family that makes a neighborhood - it's the people.

Taxes
There are only 2 things that can drive a sale: value and taxes.

Cost of Living
How does your area stack up with the rest of the country?

What might my payment be?

Want to see what a change in the purchase price or down payment options may mean for the monthly payment? Enter your figures here to find out.

Sales Price: \$925,000 (1)
Down Payment: 10.0% (1)
Interest Rate: 4.000% (1)
Term: 30 Years (1)
Tax Factor: 0.00% (1)

Approx. Monthly Payment

MLB Payment: \$3,974
Taxes: \$0.00
Insurance: \$231.25
Utilities: \$305.25
Condo/Co-op Fee: \$0.00

\$4,511 Total

Contemporary Castle Offered at \$699,000

382 W. Amity Rd.

382 W. Amity Rd. is a beautiful 2-story home with a modern design, featuring a large open floor plan, high ceilings, and a gourmet kitchen with stainless steel appliances and a large island. The home also features a master suite with a walk-in closet and a private bathroom, and a finished basement with a family room and a full bathroom. The property is located in a desirable neighborhood with excellent schools and a convenient location to shopping and dining.

CLIENT LOGO

CLIENT LOGO

Create instant Open House flyers. Plus, showcase calculators & neighborhood info.

Key Features

Sales & Marketing

- One-click site generation via MLS ID
- Autoload details and photos to site
- Co-brand with REA partners
- Instantly brand with your logo & colors
- Generate PDF for open house flyer

Compliance & Management

- Control rates displayed
- Monitor and track partnerships
- Ensure every listing is 100% compliant with proper state disclosures



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Web

Mobile

Social

Import From PSD



SHARE & DESIGN LIVE FLYERS ONLINE

Create live flyers that autoformat to fit the channel you share it on.

Key Features

Sales & Marketing

- Design and edit in detail online
- Co-brand with partners
- Responsive webpage designed to share across multiple channels
- Convert to PDF to print or attach to email
- Import a designer's PSD files
- 1-click social media sharing

Compliance & Management

- Control access & sharing by channels
- Approve/reject user-created flyers
- Manage multiple user signatures & disclosures



Each flyer can be customized to display differently depending on if you share it on the web, mobile or social. Plus, you can co-brand anywhere on the flyer.



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WORK SEAMLESSLY WITH TEAM MEMBERS

Set up workflows to manage your sales & operations from one spot.
Plus, message with and assign work to team members.

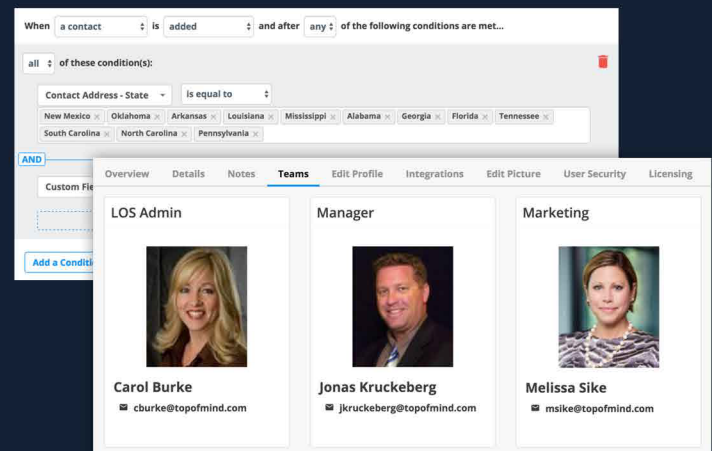
Key Features

Sales & Marketing

- Automate marketing to prospects, clients and partners
- Assign tasks to internal and external team members
- Set up rules to automate routine CRM data entry

Compliance & Management

- Assign and score leads
- Create delegate users with limited access
- Implement standardized workflows to ensure all compliant steps of loan process are completed



Build complex rule statements and use them to trigger multiple actions for yourself or team members.



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Do Your Loan Officers Need a Hand?

Getting started with a new job and a new CRM can be overwhelming.
Keep your onboarding process moving smoothly with
Surefire Data Import/Cleanup Services.

We will quickly, easily and inexpensively get your new LO's existing prospect, customer and partner data into Surefire for immediate use.

They simply export the data from any software application into an Excel spreadsheet and we take care of the rest!

Key Features

- ✓ As low as \$150 per file
- ✓ Import data via Excel or CSV
- ✓ Available for Surefire 2.0 and 3.0 users
- ✓ Fast delivery - as fast as 1 business day
- ✓ Secure data upload & handling



Email premiumservices@topofmind.com to get started today!