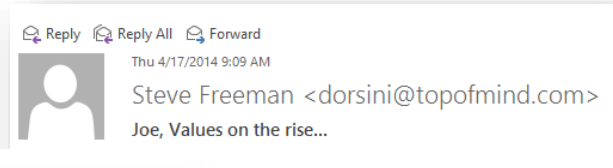


# surefire

## Recurring Emails

You'll see this set of communication referred to as monthly emails, recurring emails and turnkey emails. Top of Mind sends them each month on your behalf unless you opt out. Learn more about them here.

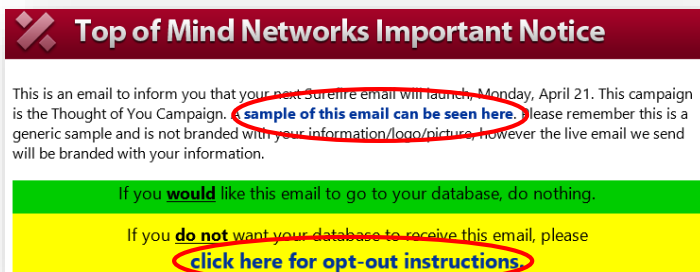
### General Information



Recurring email are personalized. They are sent from your email address and include your logo and photo.



Rotating content is themed and related to the client.



Each month, you will receive two notices regarding the upcoming blast. Please **review the sample** email. If you want it to go to your database, do nothing. If you do not want it to go to your database, **click for opt-out instructions**.

## Surefire Turnkey Email Deployment Optout

Opt-out of Thought of You scheduled to deploy on 4/21/14

Opt-out For:

Myself  
 My Company

Warning: Once you opt out, you cannot opt back into this email deployment.

[Submit](#)

Admins choose to **Opt Out For Myself** or **Opt Out For My Company**. Most Surefire users will only have the option to **Opt Out For Myself**.

**Warning: Once you opt out, you cannot opt back into this email deployment.**

## Neighborhood Activity Report (NHAR)

The Neighborhood Activity Report (NHAR) lists homes for sale or recently sold within a quarter-mile radius of the client’s home.

**Released:** February, May, August, November

**Recipients:** Client, prospect and personal/family contact types


**Contact Record must include:**

- Valid email address (“already taken” is not valid)
- If there is a closed loan, closing date of more than nine months ago
- Physical address on file (non PO Box)
- Address is able to be GEO-coded
- Data service returns one or more closings within ¼ mile of address

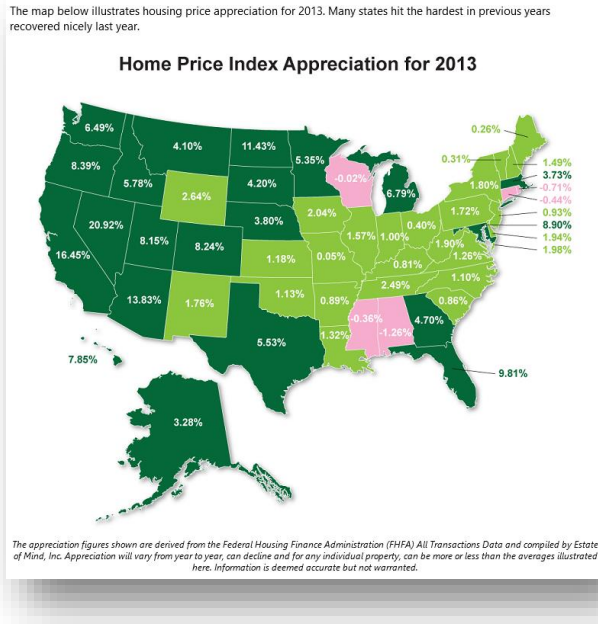
It's time for another issue of your Neighborhood Home Activity Report!

For most of us, our home is the largest investment we'll ever make. Below, please find an overview of homes that have either recently sold or are currently for sale near your address. I'll be sending this analysis every 90 days to help provide insight into local market conditions. If you find it useful, please feel free to forward it on to anyone you think might benefit from this information – and thanks again for your loyal business.

Price	Location
\$189,900.00	1120 San Jose Dr, Antioch, CA 94509 Distance: 0.07 mi
\$168,000.00	2825 Fortuna Court, Antioch, CA 94509 Distance: 0.09 mi
\$106,800.00	2800 Rio Grande Drive, Antioch, CA 94509 Distance: 0.16 mi
\$162,000.00	1000 Saint Frances Drive, Antioch, CA 94509 Distance: 0.20 mi
\$141,000.00	1200 Buchanan Rd, Antioch, CA 94509 Distance: 0.28 mi
\$133,700.00	2749 Entrada Circle, Antioch, CA 94509 Distance: 0.31 mi
\$234,900.00	1513 Mira Vista Court, Antioch, CA 94509 Distance: 0.32 mi



# Real Estate Appreciation Data (READ)



The Real Estate Appreciation Data (READ) report offers a graphic display of home appreciation rates by region along with limited commentary.

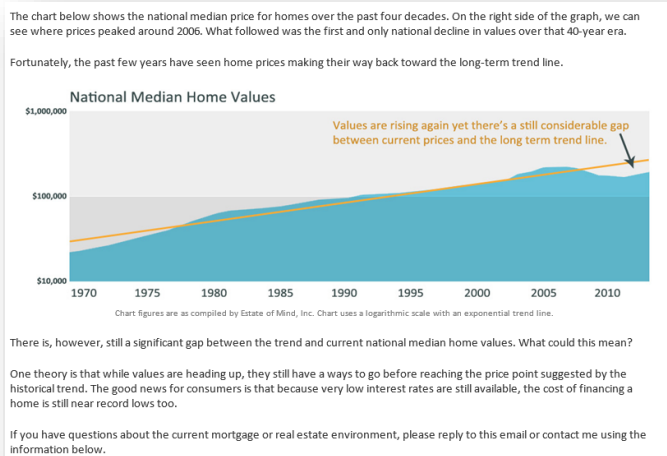
**Released:** March (year-end data) and September (1<sup>st</sup>-half of year data)

**Recipients:** Client, prospect and personal/family contact type

**Contact Record must include:**

- Valid email address (“already taken” is not valid)

## Thought of You



Thought of You emails relate industry trends, such as change in home values, inventory levels or affordability. If data sources become unavailable for one of the other emails, a Thought of You will serve as a substitute.

**Released:** January, April, July, and October

**Recipients:** Client, prospect and personal/family contact type

**Contact Record must include:**

- Valid email address (“already taken” is not valid)

# Semi-Annual Mortgage Checkup

## It's time for your Quarterly Mortgage Checkup!

As you know, I'm constantly monitoring market conditions to ensure that you're in the right loan for your needs. In that spirit, please see below for a brief analysis on how your current product stacks up against rates available today.

**Your Current Loan Information:** April 1, 2009 - 123 Main Street - 30 YR FIXED at 5.500%



Based on current market conditions, I'm assigning your current mortgage situation a **green light**. This means that it is very likely that you could benefit from refinancing your current loan. I would love the opportunity to sit down with you so we can take a closer look. If you are not too busy please reply to this email or call me at (404) 943-9910 so we can set something up.

Also, if you think any of your friends, co-workers or family members would benefit from the high level of service I provide, please refer them my way. Thank you for your loyal business and for your referrals!

The Semi-Annual Mortgage Checkup is a personalized email that goes to your contact. Based on information in the system, it compares loan data against the national average published by Freddie Mac.

**Released:** June and December

**Recipients:** Client, prospect and personal/family contact types.

### Contact Record must include:

- Valid email address ("already taken" is not valid)
- Closing date more than six months before
- 1<sup>st</sup> lien only
- Before ARM adjusts only
- Primary residence loans only
- Primarily for fixed rate loans and adjustable loans that have not adjusted yet. Other loan types, such as reverse or option ARMs, cannot be monitored.

## Avalanche Mortgage Surefire Setting

Surefire utilizes national averages for our rate tracking system. As a point of reference our rate today for a 30 yr fixed mortgage is 5.500% which is 0.375 percentage below.

**Rate Buffer:**  % *Should be a value no greater than 2.*

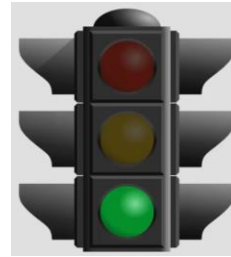
**Rate Threshold:**  % *Should be a value between .25 and 20*

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## My Account

- Company Profile
- Manage Branches
- My Profile
- My suREFire Settings
- My suREFire Rates

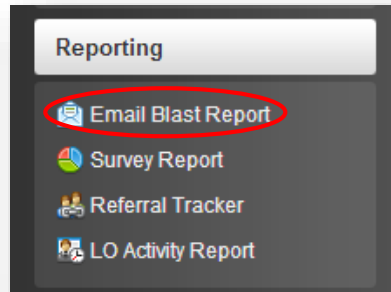
Comparisons are made based on the **Rate Buffer** and **Rate Threshold** you or your company sets in Surefire. You'll find them by clicking on **My Surefire Settings** in the right navigation bar.



A **Red Light** means no action is needed. Your client is in a good loan program.

A **Yellow Light** means your client is in a good program but may be able to save a little money.

A **Green Light** means your client can save with a new loan product now.



**BEST PRACTICE:** Check your email blast report 24 hours after the email is sent and follow up as needed.

From the right navigation bar, select **Email Blast Report**.

**Email Report**

Email reporting is dependent on your contacts viewing the emails with images enabled. It is impossible to determine whether a contact has opened an email if their email client has disabled images.

Dashboard | **Email Blasts** | Campaign Emails | In Process Emails

Displaying the last 50 Email Blasts and cached for 5 minutes for performance reasons.

Date Sent	Email Campaign Subject	Total Sent	Unique Opens	Total Opens	Opt Outs	Bounces	Reported as Spam	
Apr 17, 2014	[\$RECIPIENT NICKNAME\$], Values on the rise...	1	1	3	0	0	0	<b>Details</b>

Click on the **Email Blasts** tab, locate the email, and click the **Details** button.

[\$RECIPIENT NICKNAME\$], Values on the rise...

Email reporting is dependent on your contacts viewing the emails with images enabled. Statistics are compiled every 5 minutes.

**Opens** | Opt Outs | Bounces | Reported as Spam | Stale

Viewing 1 records.

Date Last Captured	Contact	IP Address	ISP	Location	Timezone	Total Views	
4/17/14 10:12:29 AM EDT	Joe Borrower rdavis@topofmind.com	162.40.230.39	Windstream Communications Inc		America/New_York	3	<b>View Email</b>

Click **View Email** to see the email exactly as it was sent with your branding information.

Click on the other tabs to see **Opt Outs, Bounces, Reported as Spam,** and **Stale** emails, and make changes to your database as necessary.

Follow up by calling clients who opened the email to discuss and ask for referrals.

It's that simple!

