

MORTGAGE LOAN OFFICER

New Year Goals Worksheet

The year's winding down, but your momentum is just beginning. Use this worksheet to jump-start your goals and grow your business in the new year. [Here's to your fresh start!](#)

Year-In-Review

TOP REFERRAL SOURCES:

MOST COMMON LOAN TYPES:

TOTAL LOANS CLOSED:

TOTAL VOLUME (\$):

AVERAGE LOAN SIZE:

AVERAGE DAYS TO CLOSE:

Past Year Reflections

WHAT STRATEGIES WORKED
BEST THIS YEAR?

WHAT STRATEGIES DIDN'T
WORK AS WELL?

WHAT STRATEGIES SHOULD
YOU PURSUE NEXT YEAR?

Financial Goals for the New Year

TARGET LOANS CLOSED:

COMMISSION INCOME GOAL:

TARGET VOLUME (\$):

MARKETING/ADVERTISING BUDGET:

BREAKDOWN BY QUARTER:

Q1:

Q2:

Q3:

Q4:

Process and Efficiency Goals

AVERAGE DAYS TO CLEAR
TO CLOSE GOAL:

PROCESS IMPROVEMENTS
NEEDED:

NEW TOOLS/SYSTEMS TO
IMPLEMENT:

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Lead Generation and Marketing Goals

REFERRALS AND
PARTNERSHIPS TO GROW:

(e.g., builders, financial advisors, NAR®)

CLIENT RETENTION
STRATEGIES:

(e.g., past client outreach, events, email drips, etc.)

DIGITAL MARKETING
GOALS:

(e.g., social media, website, paid ads, etc.)

COMMUNITY
OUTREACH GOALS:

Professional Development Goals

LICENSES/CE TO COMPLETE:

NEW CERTIFICATIONS/TRAININGS:

INDUSTRY CONFERENCES/EVENTS TO ATTEND:

TECHNOLOGY/CRM UPGRADES NEEDED:

Early Year Action Plan TOP THREE PRIORITIES FOR Q1 2026:

1.

2.

3.

End the Year Strong

With mortgage courses at The CE Shop.

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Dive Deeper

Develop and
fine-tune your
business plan with
this resource:

