

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

TOTAL LOANS CLOSED:

TOTAL VOLUME (\$):

AVERAGE LOAN SIZE:

AVERAGE DAYS TO CLOSE:

TOP REFERRAL SOURCES:

MOST COMMON LOAN TYPES:

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:

