



Secondary Optimization Maximizing Profitability Workshop

Maximize Secondary Profits

Secondary, one of the most comprehensive and sophisticated groups within the walls of a mortgage lender. Generally, these teams speak their own language and have their own approach toward managing competitive rates, risk, and profits. BlackFin Groups Secondary Workshop generally helps your team discover ½ M - 1M in new annual revenues.

Maximizing revenue through Secondary execution and effective pipeline management are just a couple of the critical tasks a mortgage banker is faced with, daily. This can be particularly challenging as the secondary market changes rapidly. Between market fluctuations, market speculation, rate changes, investor appetite, technology challenges, competition, risk, hedging, execution strategies, and servicing – fractions of a point can be the difference between negative earnings, par, or substantive profits. Success in Secondary, in today's mortgage markets, isn't just important, it's vital.

Objectives/Takeaways

- Strategies/frameworks that drive profitability
- Profitability Assessment Worksheet
- Checklists for conducting routine self-audits
- Best practices/recommendations (procedures policies, reports, workflow, leakage, contracts)

Who Will Benefit

- Bank Executives
- Mortgage Executives
- EVP Secondary/Capital Markets
- Secondary Team Members



Training, the critical, and indispensable task your business needs to thrive in today's marketplace. Protect your most valuable assets, your people, and your organization by providing training programs that directly benefit your team's effectiveness and delivers immediate results. Delivered by credentialed ATD Master Trainers, training sessions are designed to unleash the full potential of your organization.

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