



4-PART VIRTUAL SERIES • **APM SPRING SUMMIT** • MARCH 16, 19, 23 & 26

WORKBOOK



Welcome!

Thank you for joining us for our 2021 Spring Summit - ONE! We know your time is valuable and we've worked hard to bring you relevant, timely information to add value to your business.

Our theme this year is ONE. What does that mean? It means we are one family, moving together as owners, with a commitment to a common culture, values and position – which is doing everything in our power to make our Branch Managers and Loan Officers look good. By bringing our collective expertise to the table, we can continue our success as partners with American Pacific Mortgage and build a better company together.

Together, we can leverage the strength and vast resources of APM to continue our success as a company. Enjoy!

Thank You to Our Sponsors!



Own Your Success

SESSION 1

KEYNOTE SPEAKER

Lindsey
Vonn

US Olympic medal-winning alpine ski racer and New York Times bestselling author, Lindsey Vonn, shares her lessons in elite performance and how leadership, grit and determination lead to owning your success.

INTERVIEWED BY

NED PAYANT, APM PRESIDENT

Key Takeaways



Key Takeaways



WHAT IS ONE NEW DISCIPLINE YOU WILL ADOPT?

Own the Experience

SESSION 2

EVPs OF PRODUCTION

*Melissa
Wright
& Dustin
Sheppard*



Taking ownership of the client experience involves expertise, technology and influence. In this session you'll learn APM tactics to improve the client experience from application to closing and drive the results you want.

Key Takeaways

Key Takeaways



WHAT IS ONE NEW THING YOU WILL IMPLEMENT TODAY?

Own the Relationship

SESSION 3

EVPs OF PRODUCTION

*Melissa
Wright
& Dustin
Sheppard*



Learn how to maximize the lifetime value of every customer. From knowing more about your customers with Jornaya to other tech and engagement strategies, you'll walk away with tangible tools to retain clients for life.

Key Takeaways

Key Takeaways



WHAT IS YOUR GOAL FOR REFERRALS PER CLIENT?

Forging Our Future Together

SESSION 4

APM LEADERSHIP

Kurt
Reisig

Bill
Lowman

& Ned
Payant



Kurt, Bill and Ned discuss the future of APM and the mortgage industry as a whole. Plus, learn what partial ownership means to you as APM transitions 35% of the company shares to an **Employee Stock Ownership Plan (ESOP)**.

Key Takeaways

Key Takeaways



WHAT EXCITES YOU MOST ABOUT THE FUTURE OF APM?