

# 2020 MORTGAGE MARKETING PLAN

BUILD AWARENESS  
INCREASE LOYALTY

TARGET: CURRENT & POTENTIAL CREDIT  
UNION MEMBERS

Implementing this 12-month marketing plan will help your credit union build awareness, increase mortgage loans, and enhance member loyalty. **Login to the Partner Page at [firstheritage.org](http://firstheritage.org) to download your free digital assets today.**

MEMBER COMMUNICATIONS	PREPARE	LIVE DATE	12-MONTH ACTIVITIES	PREPARE	LIVE DATE
<b>DOWNLOAD MATERIALS, ORDER POSTERS (OPTIONAL)</b>	Jan. 7th	February 24	<b>PROMOTE MORTGAGES ON YOUR WEBSITE</b> - ADD A PRODUCT PAGE ( <a href="#">VIEW SAMPLE</a> ) & WEB BANNER ( <a href="#">DOWNLOAD</a> )	Jan 6 - <i>refreshing banners 3x per year</i>	Jan 22 - Refi March 23 - Home Buying Sept 30 - General
<b>SEND TARGETED EMAILS TO POTENTIAL HOMEBUYERS</b>	Feb. 26	March 3rd			
<b>USE DIGITAL &amp; SOCIAL ADS</b>	March 4	April 2nd	<b>STAFF EDUCATION &amp; TRAINING</b> ( <a href="#">ACCESS ONLINE</a> )	February 4 August 3	February 28 August 24
<b>PROMOTE MORTGAGES VIA ON-HOLD MESSAGES</b>	March 6	April 3rd	<b>SHARE HOMEBUYING TIPS ON SOCIAL MEDIA</b> ( <a href="#">DOWNLOAD</a> )	March 2 November 2 (VA Loans, if applicable)	March 18 (continue through Sept)
<b>HOST A HOMEBUYING SEMINAR</b>	March 16	April 17	<b>INCLUDE MORTGAGES IN YOUR NEWSLETTER</b> ( <a href="#">DOWNLOAD</a> )	March 9	Apr, July, Oct, Jan (Quarterly)
<b>REFINANCE CAMPAIGNS</b>	FH To Notify	Driven by Rates			

JANUARY							FEBRUARY							MARCH							APRIL							MAY							JUNE													
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S							
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JULY							AUGUST							SEPTEMBER							OCTOBER							NOVEMBER							DECEMBER													
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S							
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