

CREFxchange.com
Tel: 877-546-7005



Commercial Mortgage Lead Referral Program

For CRE Finance Professionals

PLATFORM OVERVIEW



New Conditions Present New Opportunities

After COVID The Markets Have Been Adjusting to a New Norm and Will Continue to Do So Through 2024. Tighter Underwriting For Some Asset Classes, Higher Rates and Workout Strategies For Others Present Huge Opportunities For Brokers and Lenders Prepared to Assist Under These Unique Circumstances.



We Can Help You Either Way...

Our Platform Provides 2 Specific Ways Brokers and Lenders Can Build Deal Flow During and After COVID.

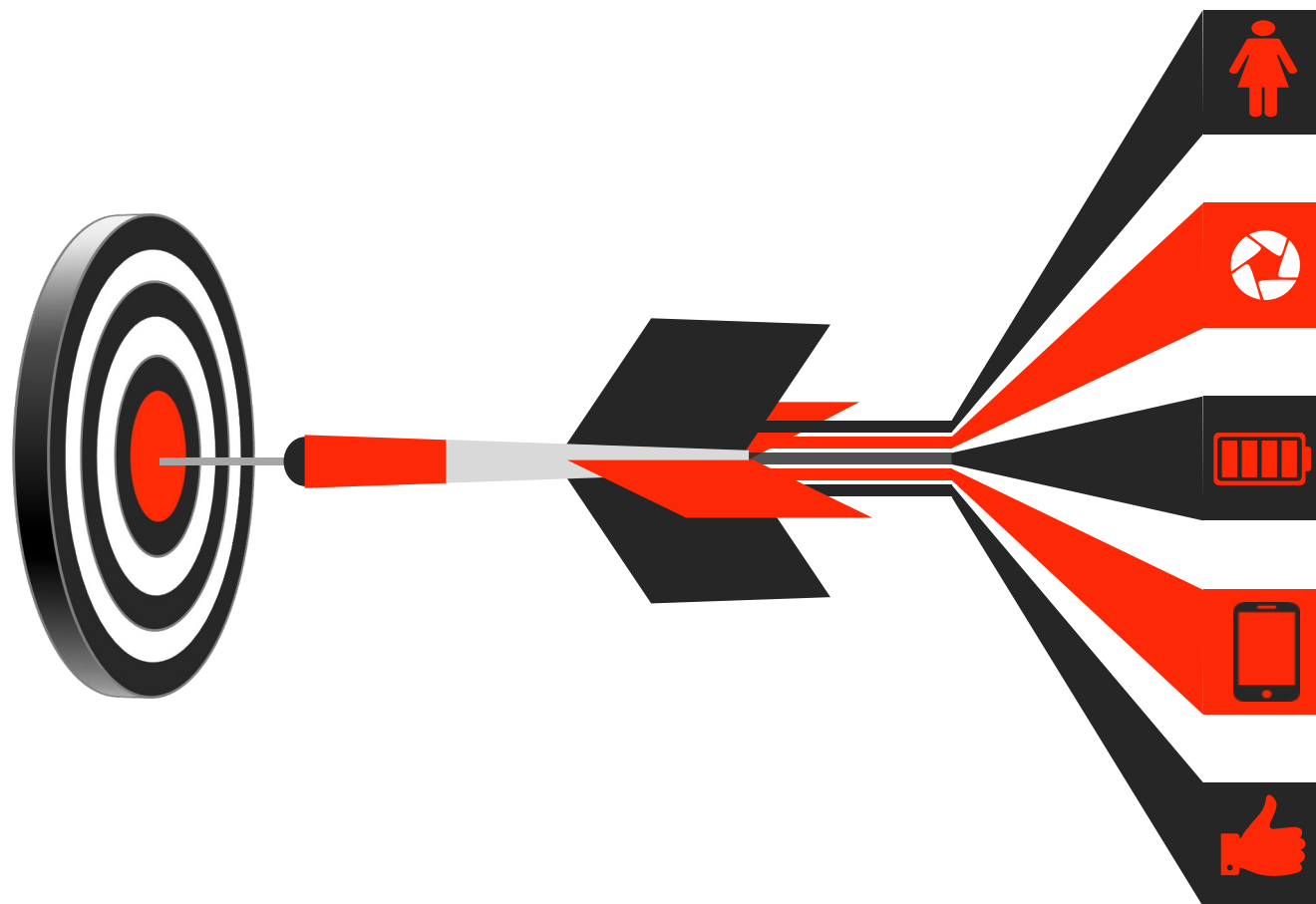
1) **Commercial Mortgage Lead Program:**

Commercial Loan Requests Referred by Realtors, CPAs / Asset Managers Which Are Phone Verified by us and Made Available to You on An Exclusive Basis (1 Download Per Only).

2) **Commercial Mortgage Modification Program:** Commercial Loans Under Duress Which Are Referred As Noted Above, Phone Verified, Presented as Exclusive WITH... Training Materials, Sample Docs, Forms, Agreements, Auto Calculating Excel Sheets and Case Support.

For More Info on Our Commercial Mod Program Please [Visit Us Here.](#)

Let's Get Right To It – Why Us ?



Commercial Mortgage Lead Sourcing:

REFERRED: Each CRE Loan Request is Referred by Industry Professionals In Our Network.. Not Internet Generated.

Exclusive: Only 1 Download Per

If You See it No One Has Taken it, If You Take it No One Will See it !

100% Contact: No Money Wasted!

Return For No Contact or Borrower Signs Elsewhere. No Money Wasted on Non-Opportunities.

Phone Verified: Prior to Upload

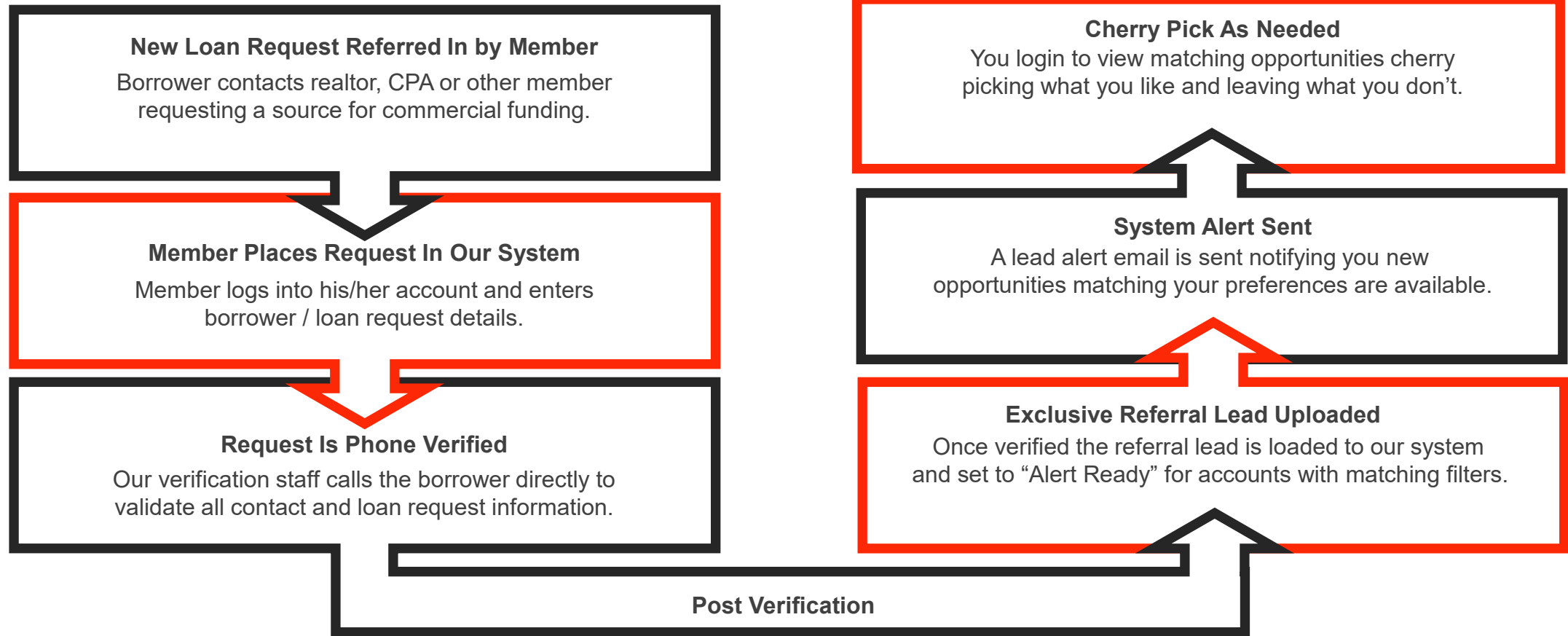
All Contact and Loan Info is Validated Prior to Upload to Ensure Both Accuracy and Viability.

Guaranteed: 2 Deals Done or Money Back!

Bottom Line.. If You Speak to 50 – 200 Exclusive Opportunities You're Going To Close Loans.

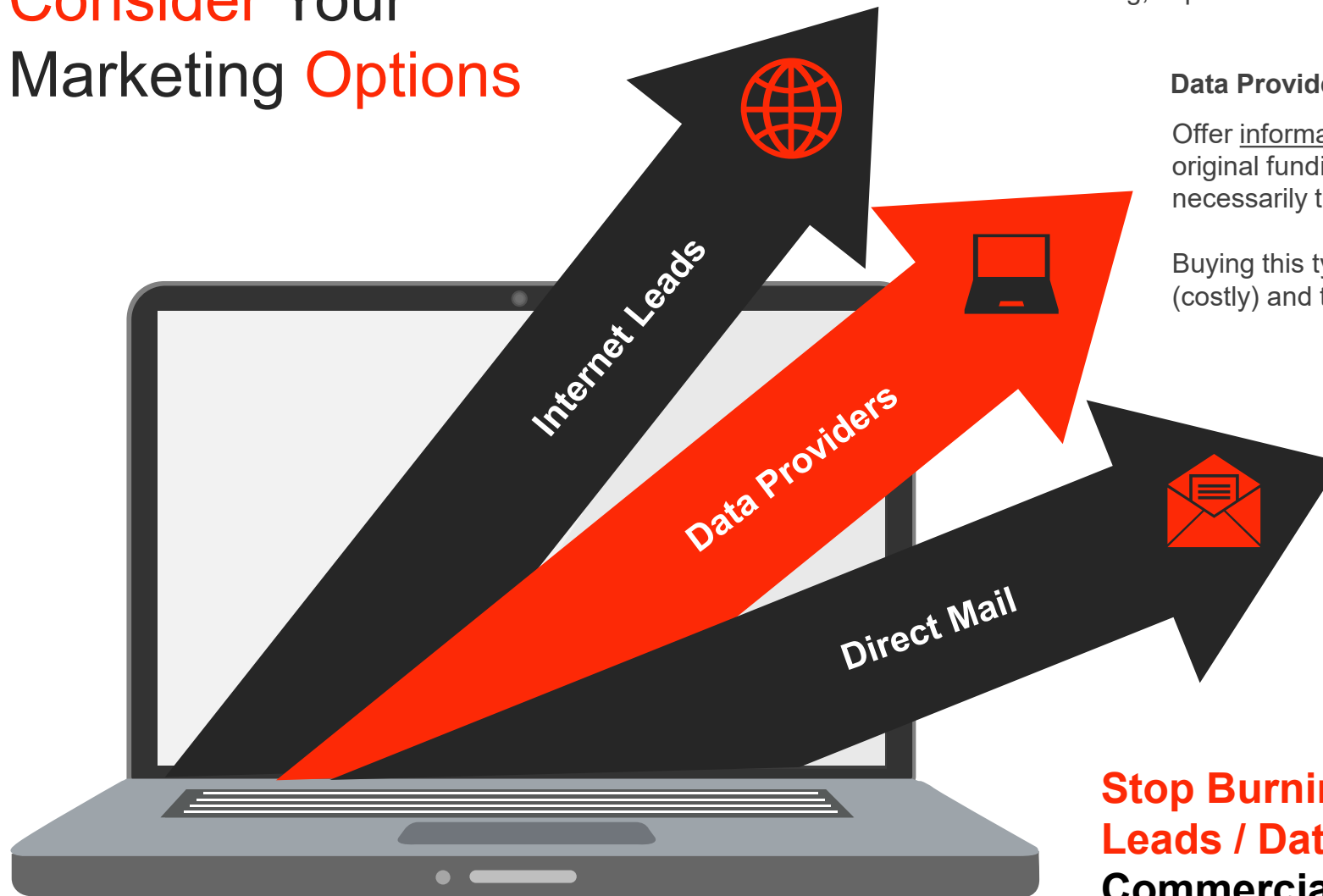
HOWEVER... If For Some Reason You Don't Close At Least 2 Loans, We'll Refund Your Full Purchase Amount.

Sourcing / Process



NOTE: There Are No Contracts, Time Frames or Fees – Keep 100% Of Your Commission

Consider Your Marketing Options



Internet Leads

Most internet leads are tire kickers poking around on the web checking for best rate / terms. You have no idea where they are in the sales cycle. SEO or pay per click ads are time consuming, expensive and typically produce low volume non-targeted inquiries.

Data Providers

Offer information (not “leads”) for commercial properties. Some include original funding info, maturity dates etc...with some contact info (not necessarily the principal / owner)

Buying this type of data usually requires paying on a contractual basis (costly) and then cold calling those prospects.

Direct Mail

Average response is about 1% IF you have a quality list and spend big on creative and is usually just a general inquiry vs. a hot opportunity. Closing ratio is therefore lower and cost of acquisition is high.

Stop Burning Marketing Dollars On Internet Leads / Data - Start Focusing On Exclusive Commercial Mortgage Referral Leads You Can Actually Close!



How It Works

Target Your Marketing Dollars To
Guarantee Success

Target The Deal Types You Know You Can Close

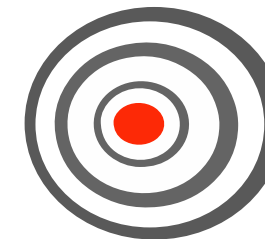


Set **Your Filters As Needed** – Change Any Time

Licensed States

[Check All](#) / [Clear All](#)

- | | | | | |
|--|---|--|---|--|
| <input checked="" type="checkbox"/> Alabama | <input checked="" type="checkbox"/> Alaska | <input checked="" type="checkbox"/> Arizona | <input checked="" type="checkbox"/> Arkansas | <input checked="" type="checkbox"/> California |
| <input checked="" type="checkbox"/> Colorado | <input checked="" type="checkbox"/> Connecticut | <input checked="" type="checkbox"/> Delaware | <input checked="" type="checkbox"/> Florida | <input checked="" type="checkbox"/> Georgia |
| <input checked="" type="checkbox"/> Hawaii | <input checked="" type="checkbox"/> Idaho | <input checked="" type="checkbox"/> Illinois | <input checked="" type="checkbox"/> Indiana | <input checked="" type="checkbox"/> Iowa |
| <input checked="" type="checkbox"/> Kansas | <input checked="" type="checkbox"/> Kentucky | <input checked="" type="checkbox"/> Louisiana | <input checked="" type="checkbox"/> Maine | <input checked="" type="checkbox"/> Maryland |
| <input checked="" type="checkbox"/> Massachusetts | <input checked="" type="checkbox"/> Michigan | <input checked="" type="checkbox"/> Minnesota | <input checked="" type="checkbox"/> Mississippi | <input checked="" type="checkbox"/> Missouri |
| <input checked="" type="checkbox"/> Montana | <input checked="" type="checkbox"/> Nebraska | <input checked="" type="checkbox"/> Nevada | <input checked="" type="checkbox"/> New Hampshire | <input checked="" type="checkbox"/> New Jersey |
| <input checked="" type="checkbox"/> New Mexico | <input checked="" type="checkbox"/> New York | <input checked="" type="checkbox"/> North Carolina | <input checked="" type="checkbox"/> North Dakota | <input checked="" type="checkbox"/> Ohio |
| <input checked="" type="checkbox"/> Oklahoma | <input checked="" type="checkbox"/> Oregon | <input checked="" type="checkbox"/> Pennsylvania | <input checked="" type="checkbox"/> Rhode Island | <input checked="" type="checkbox"/> South Carolina |
| <input checked="" type="checkbox"/> South Dakota | <input checked="" type="checkbox"/> Tennessee | <input checked="" type="checkbox"/> Texas | <input checked="" type="checkbox"/> Utah | <input checked="" type="checkbox"/> Vermont |
| <input checked="" type="checkbox"/> Virginia | <input checked="" type="checkbox"/> Washington | <input checked="" type="checkbox"/> West Virginia | <input checked="" type="checkbox"/> Wisconsin | <input checked="" type="checkbox"/> Wyoming |
| <input checked="" type="checkbox"/> District of Columbia | | | | |



Commercial Loan Preferences

Credit Status:

- ☒ Excellent ☒ Good ☒ Fair ☒ Poor

Loan Type:

[Check All](#) / [Clear All](#)

- | | |
|--|--|
| <input checked="" type="checkbox"/> Acquisition | <input checked="" type="checkbox"/> Asset Base |
| <input checked="" type="checkbox"/> Bridge | <input checked="" type="checkbox"/> Cash Flow |
| <input checked="" type="checkbox"/> Conduit | <input checked="" type="checkbox"/> Construction |
| <input checked="" type="checkbox"/> Credit Lease | <input checked="" type="checkbox"/> Credit Tenant |
| <input checked="" type="checkbox"/> Fixed Rate | <input checked="" type="checkbox"/> Floating Rate |
| <input checked="" type="checkbox"/> Forward Commitment | <input checked="" type="checkbox"/> Hard Money |
| <input checked="" type="checkbox"/> Interim | <input checked="" type="checkbox"/> Investment |
| <input checked="" type="checkbox"/> Mezzanine | <input checked="" type="checkbox"/> Permanent |
| <input checked="" type="checkbox"/> Refinance | <input checked="" type="checkbox"/> Securitization |
| <input checked="" type="checkbox"/> Short Term | <input checked="" type="checkbox"/> Syndicated Deals |
| <input checked="" type="checkbox"/> Union Built | <input checked="" type="checkbox"/> Variable Rate |
| <input checked="" type="checkbox"/> Other | <input checked="" type="checkbox"/> Modification |

Minimum Loan Amount: (\$)

500,000

Maximum Loan Amount: (\$)

20,000,000+

Maximum LTV:

100

Property Types:

[Check All](#) / [Clear All](#)

- | | |
|--|--|
| <input checked="" type="checkbox"/> Apartment | <input checked="" type="checkbox"/> Automotive |
| <input checked="" type="checkbox"/> Hotel | <input checked="" type="checkbox"/> Industrial |
| <input checked="" type="checkbox"/> Investment | <input checked="" type="checkbox"/> Land |
| <input checked="" type="checkbox"/> New Construction | <input checked="" type="checkbox"/> Office |
| <input checked="" type="checkbox"/> Park | <input checked="" type="checkbox"/> Restaurant |
| <input checked="" type="checkbox"/> Retail | <input checked="" type="checkbox"/> Other |

Update

Cancel

New Lead Alerts Sent In Real Time



Get Real Time Notifications – No Stale Opportunities

When leads matching your filters are loaded, our system sends a “lead alert” notifying you there are new opportunities available. You click the link in this email, log into your account and cherry pick the deals you want.

SAMPLE:

Dear _____,

New leads have just been uploaded matching your current preferences. Please log in Now to view and download.

REMEMBER... If you see it, no one has taken it...If you take it, no one will see it.

[Login to your account here](#)

* This email was automatically generated by our system. Please do not respond to this email. If you have any questions or concerns, please direct those inquiries to our Customer Care team by using our [Help Desk](#).

Hot Off The Press!

Each Commercial Loan Request is **Referred** by Industry Professionals and Then Phone Verified by Our Staff.

Once Verified They Are Loaded and An Email Alert is Sent Notifying You New Matching Opportunities Are Available.

Timing Matters Right?

Each New Commercial Loan Request Is Anywhere From Seconds to An Hour or So Old Depending on How Quickly You Login After Receiving The Lead Alert.

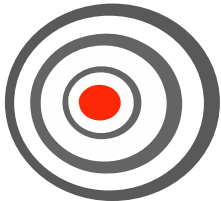
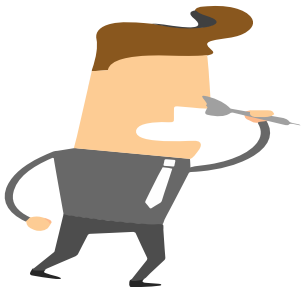
No Stale Opportunities... Any Referral Not Taken on a Given Day Are Taken Down and Re-Verified The Next Day to Ensure Conditions Are The Same and The Need is Still There.

Cherry Pick What Works Best For You



Login And View Matching Referrals - Further Sort By 5 Different Columns

Once Logged In, Click The “Search Available Leads” Link Just Below The Top Menu.
Sort Further > Ascending or Descending by Clicking The Up or Down Arrows. Then Choose The Referrals You Want by Clicking The “Get” Button and “Checkout”. It’s That Simple!



Your Current Filters

States:

AL AK AZ AR CA CO CT DE FL GA HI ID IL IN IA KS KY LA ME MD MA MI MN MS MO MT NE NV NH NJ NM NY NC ND OH OK OR PA RI SC SD TN TX UT VT VA WA WV WI WY DC

Loan Types:

Acquisition Asset Base Bridge Cash Flow Conduit Construction Credit Lease Credit Tenant Fixed Rate Floating Rate Forward Commitment Hard Money Interim Investment Mezzanine Permanent Refinance Securitization Short Term Syndicated Deals Union Built Variable Rate Other Modification

Credit Status:

Excellent Good Fair Poor

Min Loan Amount:

\$2,500,000

Max Loan Amount:

\$999,999,999

Max LTV:

100%

Property Type:

Apartment Automotive Hotel Industrial Investment Land New Construction Office Restaurant Retail Other

Leave Store

View Cart

Checkout

Current Balance:

\$0.00

0 items, \$0.00

Navigation: Viewing 1 - 10 of 210 records. [1 2 Next]

Owner / Tenant = Owner / Tenant Occupied										
Name	Loan Type ▲▼	State ▲▼	Loan Amount ▲▼	LTV ▲▼	Credit ▲	Property Value	Property Type	Owner	Tenant	
Scott	Refinance	CO	\$51,000,000	50%	Excellent	\$100,000,000	Office / Ind	No	Yes	GET
Mike	Acquisition	IL	\$33,200,000	65%	Excellent	\$53,500,000	Apartment	No	Yes	GET
Ben	Refinance	MO	\$41,350,000	62%	Excellent	\$65,000,000	Industrial	Yes	No	GET
Gloria	Refinance	CA	\$25,800,000	68%	Excellent	\$36,300,000	Industrial	No	Yes	GET
Tom	Acquisition	NY	\$20,000,000	49%	Good	\$41,000,000	Apartment	No	Yes	GET
Melvin	Refinance	VA	\$10,000,000	67%	Excellent	\$15,000,000	Hotel	Yes	No	GET
Samuel	Acquisition	TN	\$12,851,000	65%	Excellent	\$19,000,000	Apartment	No	Yes	GET
Guy	Hard-Money	FL	\$7,900,000	65%	Excellent	\$13,000,000	Office / Retail	No	Yes	GET
Gale	SBA	NJ	\$4,500,000	55%	Good	\$8,000,000	Manufacturing	Yes	No	GET
Rick	Modification	OH	\$5,960,000	80%	Poor	\$7,760,000	Office	No	Yes	GET

Download In Any Format – Archived For Convenience



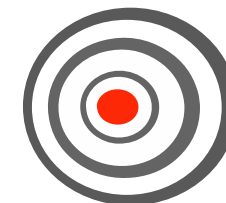
Download In Any Of Three Formats – Excel, HTML or CSV

After cherry picking the referrals you want, you can download in any format knowing your downloads will always be archived in your account for easy access any time.

- [View Invoice for this Order](#)
- Download Loan Applicant Leads [HTML](#) [Excel](#) [CSV](#)

Listed in the table below are the leads you received in this order. **Please choose a format (ABOVE) in which you wish to view your leads.** Remember, you are not limited to one particular format; you have the ability to alter the format as is most convenient for you.

Date	Type	Name	Loan	State	Amount	LTV	Credit	Owner	Tenant
Fri 08/14/20	Loan Applicant	Freddie H	Hard Money	FL	\$14,500,000	85%	Good	Yes	No
Fri 08/14/20	Loan Applicant	Roy P	Fixed Rate	MS	\$2,500,000	93%	Excellent	No	Yes
Fri 08/14/20	Loan Applicant	Nolan H	Acquisition	UT	\$2,250,000	79%	Excellent	No	Yes
Fri 08/14/20	Loan Applicant	Jackie M	Refinance	FL	\$10,000,000	50%	Good	No	No
Fri 08/14/20	Loan Applicant	Edward W	Fixed Rate	NY	\$4,768,748	75%	Good	No	Yes
Fri 08/14/20	Loan Applicant	Martin V	Fixed Rate	IL	\$1,300,000	70%	Good	Yes	No
Fri 08/14/20	Loan Applicant	Devan Y	Acquisition	DE	\$1,000,000	80%	Excellent	No	Yes
Fri 08/14/20	Loan Applicant	Patricia M	Floating Rate	NY	\$10,000,000	50%	Good	No	Yes
Fri 08/14/20	Loan Applicant	Robert J	Acquisition	CO	\$1,900,000	64%	Excellent	No	No



Four Affordable Programs To Choose From



Level 4

200 Referrals

Exclusive

Return For No Contact

Return For Signed Elsewhere

Custom Email To Borrower

Closed Deal Guarantee

Directory Listing w/Bio/Logo

2,000 PDB Downloads

Preferred Placement

Outbound Monthly Marketing

Listing Metrics – Clicks/Impressions

Multi-User Setup

Level 3

128 Referrals

Exclusive

Return For No Contact

Return For Signed Elsewhere

Custom Email To Borrower

Closed Deals Guarantee

Directory Listing w/Bio

1,000 PDB Downloads

Listing Metrics – Clicks/Impressions

Level 2

87 Referrals

Exclusive

Return For No Contact

Return For Signed Elsewhere

Custom HTML Email To Borrower

Closed Deals Guarantee

Level 1

55 Referrals

Exclusive

Return For No Contact

Return For Signed Elsewhere

Text Email To Borrower

Closed Deals Guarantee

Build Deal Flow & Referrals On Steroids !

You Can Build Deal Flow With Exclusive Commercial Mortgage Leads and Your Own Referring Network At The Same Time.

LEVELS 3 & 4

Receive Inbound Targeted Loan Requests

Your Directory Listing Will be Exposed to Commercial Realtors, CPAs and Others Seeking Funding For a Borrower Client. **Think about it...** You Get The Deal AND The Relationship. Over 500,000 Searches Done Monthly!

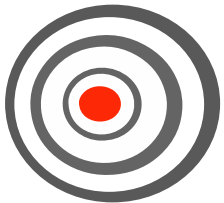
Level 4 CRE Marketing Powerhouse

- ✓ Exclusive Commercial Referral Leads
- ✓ Property Owner Database Access
- ✓ Directory Listing Exposure
- ✓ Preferred Placement
- ✓ Metrics – Clicks / Impressions
- ✓ Multiple Logins For LOs
- ✓ Monthly Outbound Marketing
- ✓ Guarantee – 2 Closed or Money Back!

Gain Exposure And Build Referring Relationships



Your Directory Listing – Image, Logo, Details





Joe Tester
Acme Mortgage
What are you waiting for? Click my ad!

Contact Information

 1234 Testing Street
Jacksonville, FL 32225
Main: (904) 555-1234
Alt: (904) 555-5675
Mobile: (904) 555-9798
Fax: (904) 555-9898
creditgr@yahoo.com

Loan Information

Credit Status Accepted:	Excellent Excellent Good Good Fair Fair Poor Poor
Max Loan-to-Value:	100%
Min Loan Amount:	\$100,000
Loan Types Offered:	Acquisition Acquisition Asset Base Asset Base Bridge Bridge Cash Flow Cash Flow Conduit Conduit Construction Construction Credit Lease Credit Lease
Property Types:	Automotive Industrial Investment Office Park Restaurant Retail
Owner Occupied:	Yes No
Tenant Occupied:	Yes No
Licensed States:	AL AL AK AK AZ AZ AR AR CA CA CO CO CT CT DE DE FL FL GA GA HI HI ID ID IL IL IN IN IA IA KS KS KY KY LA LA ME ME MD MD MA MA MI MI MN MN MS MS MO MO MT MT NE NE NV NV NH NH NJ NJ NM NM NY NY NC NC ND ND OH OH OK OK OR OR PA PA RI RI SC SC SD SD TN TN TX TX UT UT VT VT VA VA WA WA WV WV WI WI WY WY DC DC

Lender Bio & Offers

Nam libero tempore, cum soluta nobis est eligendi optio cumque nihil impedit quo minus id quod maxime placeat facere possimus, omnis voluptas assumenda est, omnis dolor repellendus.

Your Directory Listing (Found When A Search is Done Matching Your Filters)
Tells other network members all they need to know about your firm, its capabilities and types of loans you're able to fund.

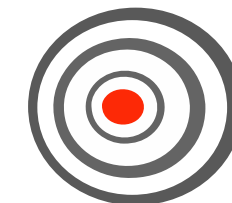
Up to 750 characters for Your Bio & Offers with Your URL (website address) clickable, allowing the viewer to open your site in a separate window.

Change Anything about Your Listing Any Time and Those Changes Will Be Published Instantly. No 6 – 10 week lead time needed as in print and other advertising.

Throttle It Up With Preferred Placement (level 4)



Gain Exposure With Google-esk Search And Preferred Placement



Commercial Lender Search Results

Your search criteria and results show below. You can click any listing to see the lender's professional profile page.
[New Search](#) | [Sign Out](#)

Your Chosen Search Criteria			
Loan Amount:	\$1,000,000	Loan-to-Value:	90%
Loan Type:	Investment	Credit Status:	Good
Property Type:	Investment	Property State:	FL
Owner Occupied:	No	Tenant Occupied:	No

Results 1 - 3 of 3

Featured Listings

Joe Tester - Acme Mortgage

Nam libero tempore, cum soluta nobis est eligendi optio cumque nihil impedit quo minus id quod maxime placeat facere possimus, omnis voluptas assumenda est, omnis dolor repellendus.
[What are you waiting for? Click my ad!](#) - [View Details](#)

Terry Testperson - Go Happy Realty

Lorem ipsum dolor sit amet, consectetur adipisicing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.
[This is my tagline!](#) - [View Details](#)

Fred Jones - Acme Mortgage

There are many variations of passages of Lorem Ipsum available, but the majority have suffered alteration in some form, by injected humour, or randomised words which don't look even slightly believable. If you are going to use a passage of Lorem Ipsum, you need to be sure...
[Booyah! Let's do this deal!!](#) - [View Details](#)

[New Search](#) | [Sign Out](#)

Receive Inbound Contact With Preferred Placement:

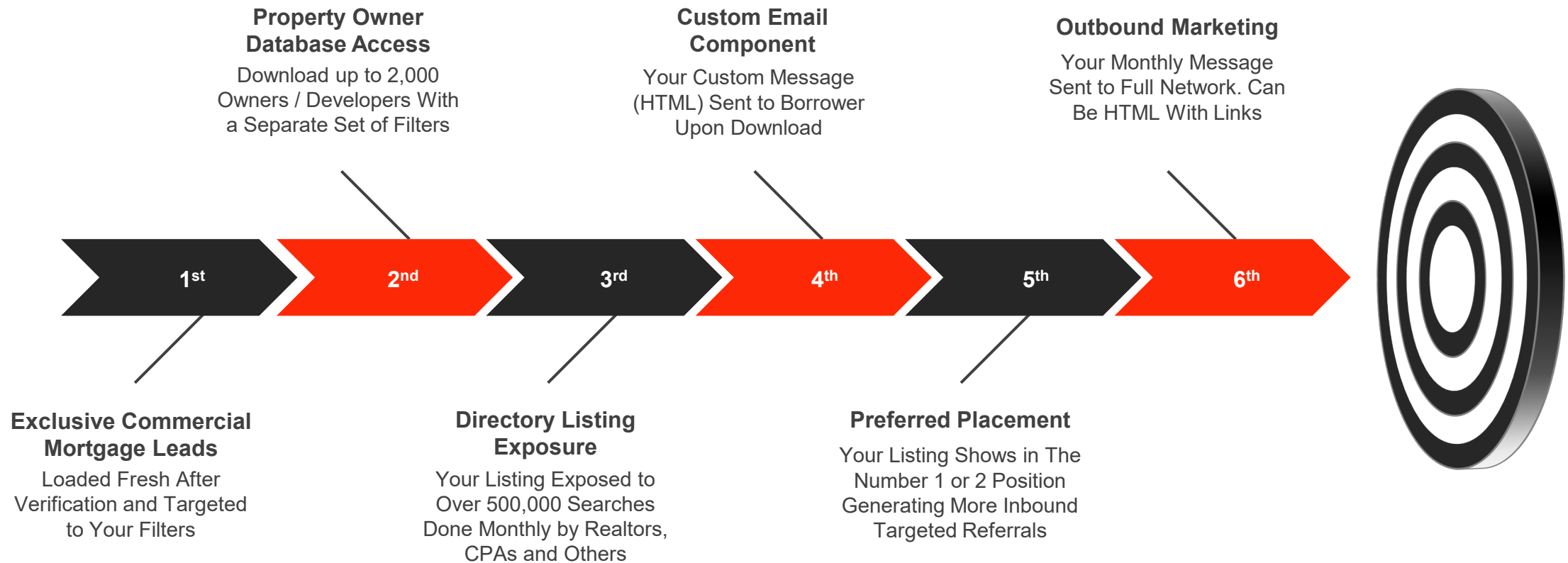
Over 500,000 Searches Done Monthly!

Level 4 Clients Enjoy **“preferred placement”** Placing Your Listing at The Top of Any Search Done on Our Platform Matching Your Filters.

When a Member (Realtor, CPA, Asset Mgr) Searches For Funding They See Your Listing With Tag Line and Click to Access (see previous screen for sample).

Why Pay for Marketing You Hope Works, When You Can Invest in Advertising You Know Will Work?

Level 4 – Build Deal Flow 6 Ways



Targeted Commercial Leads is Just The Beginning, Not the End of How We Work to Ensure Your Success.



More Tools & Resources

More Tools & Resources:

- **DOWNLOAD IN ANY OF 3 FORMATS** - Excel, CSV or HTML
- **PROPERTY OWNER DB ACCESS** - Download From Thousands of CRE Owners / Developers Based on Your Specific Needs With a Separate Set of Filters.
- **LENDER SEARCH** - Search 4200 Commercial Funding Sources To Find A Home For Any Loan.
- **SALES TOOLS / MATERIALS** - Scripts, Training Materials, Sample Forms, Docs, Agreements and Excel Spreadsheets.
- **COMBO ACCOUNTS** - Download Both Direct to Borrower and Broker Referred CRE Requests.
- **INBOUND CONTACT** - Your Directory Listing – Searched Over 500,000x Monthly by Industry Professionals Creates Inbound Contact Bringing You The Deal AND Relationship. (Levels 3&4)
- **BE FOUND 1st** - With Preferred Placement – Your Listing Shows in The Number 1 or 2 Position For Any Matching Search Done by Realtors, CPAs and Others. (Levels 3&4)
- **BUILD YOUR BRAND** - Monthly Email Campaign – to Over 480,000 Network Members Helps You Grow Your Brand and Deal Flow Ongoing. (Levels 3&4)
- **MARKETING METRICS** - Clicks / Impressions and Statistical Data So You Can Adjust Your Campaign as Needed.

We Make Your Team More Competitive by Giving You Access to Exclusive Commercial Mortgage Leads Referred by Other CRE Professionals and Filtered to Your Needs While Helping You Build More Referring Relationships.

Style Let's Get Started!

Business Development Team:

Tel: 877-546-7005

Web: CREFxchange.com

Email: Marketing@CREFxchange.com

