



Sue Woodard



877.498.6888 www.vforms.com

"I have been personally involved and worked with the owners at vForms Software since 2002. If you are looking for a contact management database for your mortgage operation that is completely relational, I highly recommend WorkCenter CRM, by the makers of vForms. While some database products tell you what you should be doing, WorkCenter does it with a few clicks every morning. Plus, their customer support is excellent and thorough which is a rarity in technology! To add exponential worth to your WorkCenter, add my libraries in both *English* and *Spanish*. My 'Before, During and After' processes are totally reflected in the action plans and customer communications. Sue Woodard and WorkCenter, a winning combination!"

vForms Software partnered with Sue Woodard to create a powerful group of libraries available in **English** and/or **Spanish** (*see list on pages 2-8*). Loaded easily into your copy of WorkCenter, they add a punch to your everyday marketing which will take you to the top of the industry in no time. Think of it – you, Sue Woodard and WorkCenter – a winning combination!

The Sue Woodard Libraries include emails, letters and action plans organized with the sales life cycle in mind. They provide marketing materials for Before, During and After the loan that will set you apart from your competition. Once you have WorkCenter and your Sue Woodard library, you will find:

- A complete set of **letters, emails and action plans**.
- Customized with your **corporate logo** and **contact info**.
- Personalized with **individual client information**.
- Pre-formatted **HTML e-mail messages** and **mail merge letters** for direct and e-mail marketing.

Utilize the syncing capability of WorkCenter to import your data from a wide variety of sources. Then, combine your content with highly-charged marketing materials from The Mortgage Market Guide and/or LoanToolbox to create marketing campaigns that pull from the best of your high impact materials. WorkCenter comes pre-loaded with a full library of its own, ready for you to customize and fine-tune in your own words so it sounds like you and your organization.

Other software solutions may tell you what to do but WorkCenter does it for you with automated Action Plans requiring no more than a couple mouse clicks each morning! WorkCenter is truly a full blown CRM (Contact Relationship Management) tool which manages your data to create Clients For Life.

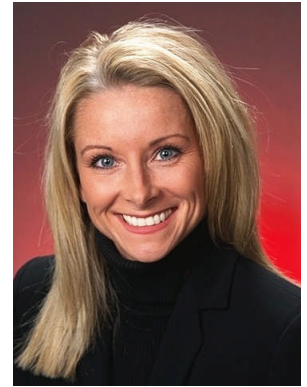
Contact your Business Development Officer at vForms for pricing information on WorkCenter and the Sue Woodard Libraries today!

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Sue Woodard English Library Forms for WorkCenter CRM

E-mail Forms

Administrative E-mail:

- Cold Client – Checking In
- Fax Cover Sheet
- Memo
- Original Fax Cover Sheet

During Purchase E-mail:

- 01 Buyer Beginning Transaction
- 02 Seller Beginning Transaction
- 03 Selling Agent Beginning Transaction
- 04 Listing Agent Beginning Transaction
- 05 Buyer Midstream Transaction
- 06 Buyer Pre-Closing
- 07 Buyer Post-Closing
- 09 Selling Agent Post-Closing
- 10 Listing Agent Post-Closing
- 11 Buyer Survey Post-Closing

During Refinance E-mail:

- 01 Refinance Beginning Transaction
- 02 Refinance Midstream
- 03 Refinance Pre-Closing
- 04 Refinance Post-Closing
- 05 Refinance Post-Closing Thank You Note
- 06 Refinance Post-Closing Survey
- 07 Refinance Settlement Statement Year End

E-mail After:

- 01 Financial Planner
- 02 Controlling Debt
- 03 Internet Fraud
- 04 Prepaying your Mortgage
- 05 Home Equity
- 06 Home Upgrade Tips
- 07 Home Maintenance Tips
- 08 Landscaping



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Sue Woodard English Library Forms for WorkCenter CRM Continued

E-mail After Continued:

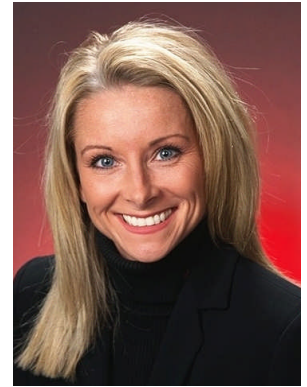
- 09 Fire Safety
- 10 Light Upgrade Ideas1
- 11 Light Upgrade Ideas2
- 12 Identity Theft1
- 13 Burglar Proofing
- 14 401k Planning
- 15 Protect Your Home While Traveling
- 16 IRA Planning
- 17 Pest Control
- 18 Tax Consequences
- 19 Good Credit
- 20 Automotive
- 21 Identity Theft2
- 22 Wills
- 23 Investment Accounts
- 24 IRS Audit Targets
 - Mortgage Insurance
 - Rate Change
 - Refinance

E-Mail Before:

- 01 Mortgage Interest
- 02 Capital Gains
- 03 Mortgage Insurance
- 04 Title Insurance
- 05 Mortgage Rates
- 06 Credit Rating
- 07 Maintenance
- 08 Location
- 09 Appraisal
- 10 A P R
- 11 Fed Funds Rate
- 12 Financial Concerns



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Sue Woodard English Library Forms for WorkCenter CRM Continued

E-mail Bonus:

- 01 Items Needed
- 02 Personal Brochure
- 03 Pre-Approval Certificate
- 04 Refinance Items Requested
- 05 Pre-Approval Info Letter
- 06 Purchase Info Cover Letter
 - Cold Client – Checking In

Print Letters:

Admin Instructions:

Recommended frequency of mailings

Labels – Print:

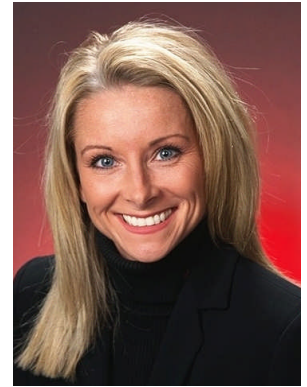
- Contact Label
- Envelopes #10
- R E Agent Label

Letter – After:

- 01 Financial Planner
- 02 Controlling Debt
- 03 Internet Fraud
- 04 Prepaying Your Mortgage
- 05 Home Equity
- 06 Home Upgrade Tips
- 07 Home Maintenance Tips
- 08 Landscaping
- 09 Fire Safety
- 10 Light Upgrade Ideas1
- 11 Light Upgrade Ideas2
- 12 Identity Theft
- 13 Burglar Proofing
- 14 401k Planning
- 15 Protect Your Home While Traveling
- 16 IRA Planning
- 17 Pest Control
- 18 Tax Consequences



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Sue Woodard English Library Forms for WorkCenter CRM Continued

Letter – After Continued:

- 19 Good Credit
- 20 Automotive
- 21 Identity Theft-2
- 22 Wills
- 23 Investment Accounts
- 24 I R S Audit Targets
 - Mortgage Insurance
 - Rate Change
 - Refinance

Letter – Before:

- 01 Mortgage Interest
- 02 Capital Gains
- 03 Mortgage Insurance
- 04 Title Insurance
- 05 Mortgage Rates
- 06 Credit Rating
- 07 Maintenance
- 08 Location
- 09 Appraisal
- 10 APR
- 11 Fed Funds Rate
- 12 Financial Concerns

Letter – Bonus:

- 01 Items Needed
- 02 Personal Brochure
- 03 Pre-Approval Certificate
- 04 Refinance Items Requested
- 05 Pre-Approval Info Letter
- 06 Purchase Info Cover Letter

During Refinance Letters:

- 01 Refinance Beginning Transaction
- 02 Refinance Midstream
- 03 Refinance Pre-Closing



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Sue Woodard English Library Forms for WorkCenter CRM Continued

During Refinance Letters Continued:

- 04 Refinance Post-Closing
- 05 Refinance Post-Closing Thank You Note
- 06 Refinance Post-Closing Survey
- 07 Refinance Settlement Statement Year End

During Purchase Letters:

- 01 Buyer Beginning Transaction
- 02 Seller Beginning Transaction
- 03 Selling Agent Beginning Transaction
- 04 Listing Agent Beginning Transaction
- 05 Buyer Midstream Transaction
- 06 Buyer Pre-Closing
- 07 Buyer Post-Closing
- 08 Buyer Post Closing Note Card
- 09 Selling Agent Post-Closing
- 10 Listing Agent Post-Closing
- 11 Buyer Survey Post-Closing
- 12 Settlement Statement Year End
- 13 Buyer One Year Anniversary

Administrative Print:

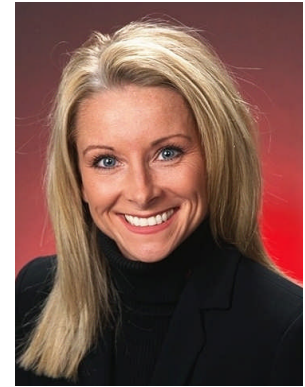
- Cold Client – Checking In
- Fax Cover Sheet
- Memo
- Original Fax Cover Sheet

Planning Documents Print:

- Action Plan
- Ideas On Creating Your Own Corporate Account Book
- Ideas On Creating Your Own Playbook
- Ideas On Creating Your Own Reference Sheets
- Sample Corporate Book
- Sample Corporate Book 2
- Sample Hot Sheet
- Using Mortgage Market Guide Weekly



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Sue Woodard Spanish Library Forms for WorkCenter CRM

Print Letters

Letter – After:

- 01 Financial Planner - Spanish
- 02 Controlling Debt – Spanish
- 03 Internet Fraud – Spanish
- 04 Prepaying Your Mortgage – Spanish
- 05 Home Equity – Spanish
- 06 Home Upgrade Tips – Spanish
- 07 Home Maintenance Tips – Spanish
- 08 Landscaping – Spanish
- 09 Fire Safety – Spanish
- 10 Lighting Upgrade Ideas – Spanish
- 11 Lighting Upgrade Ideas 2 – Spanish
- 12 Identity Theft – Spanish
- 13 Burglar Proofing – Spanish
- 14 401 K Planning – Spanish
- 15 Protect Your Home While Traveling – Spanish
- 16 I R A Planning – Spanish
- 17 Pest Control – Spanish
- 18 Tax Consequences – Spanish
- 19 Good Credit – Spanish
- 20 Automotive – Spanish
- 21 Identity Theft – Spanish
- 22 Wills – Spanish
- 23 Investment Accounts – Spanish
- 24 I R S audit Target – Spanish
- Arm Change Date – Spanish
- Mortgage Insurance Removal – Spanish
- Refinance Solicitation – Spanish

Letter – Before:

- 01 Mortgage Interest – Spanish
- 02 Capital Gains – Spanish
- 03 Mortgage Insurance – Spanish
- 04 Title Insurance – Spanish
- 05 Mortgage Rates – Spanish



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Sue Woodard Spanish Library Forms for WorkCenter CRM Continued

Letter – Before Continued:

- 06 Credit Rating – Spanish
- 07 Maintenance – Spanish
- 08 Location – Spanish
- 09 Appraisal – Spanish
- 10 A P R – Spanish
- 11 Prime Rate – Spanish
- 12 Financial Concerns – Spanish
- Cold Client Letter – Spanish

Letter – During Purchase:

- 01 Buyer – At beginning of transaction – Spanish
- 02 Seller – At beginning of transaction – Spanish
- 03 Selling Agent – At beginning of transaction – Spanish
- 04 Listing Agent – At beginning of transaction – Spanish
- 05 Buyer –Midstream transaction – Spanish
- 06 Buyer – Pre -closing – Spanish
- 07 Buyer – Post Closing – Spanish
- 08 Buyer – Post Closing Note Card – Spanish
- 09 Selling Agent – Post Closing – Spanish
- 10 Listing Agent – Post Closing – Spanish
- 11 Buyer Survey – Post Closing – Spanish
- 12 Settlement Statement – Year End – Spanish
- 14 Buyer One Year Anniversary Note Card Reminder

Letter – During Refinance:

- 01 At Beginning of Transaction – Spanish
- 02 Midstream – Spanish
- 03 Pre-closing – Spanish
- 04 Post Closing – Spanish
- 05 Post Closing Thank You Card – Spanish
- 06 Survey Post Closing – Spanish
- 07 Settlement Statement Year – Spanish

Letter – Miscellaneous:

- Items Requested - Spanish
- Personal Brochure – Spanish
- Pre-approval Certificate – Spanish
- Refinance Items Requested - Spanish