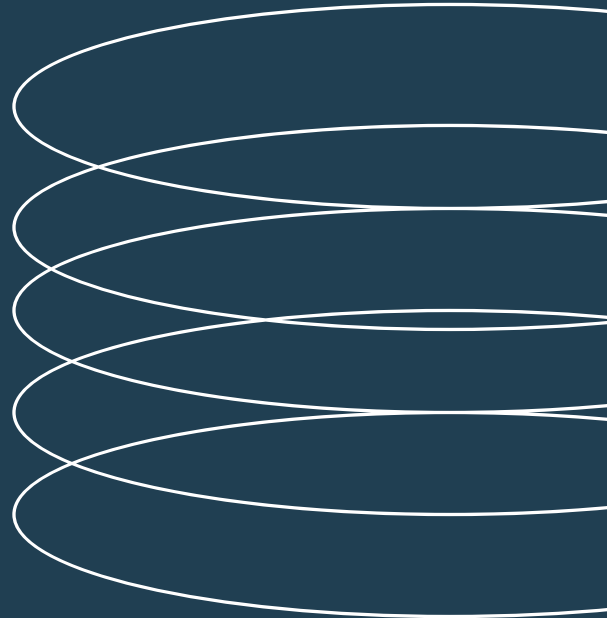


# The \$100k+ Opportunity

For CPAs and Tax Professionals



A STEP-BY-STEP GUIDE





# The Opportunity

Are you looking for a part-time opportunity to boost your income without impacting your current job? Look no further than InstaMortgage, the fastest-growing mortgage company in the Americas according to the 2022 and 2023 rankings by Financial Times and Statista.

The opportunity is unique because it requires minimal time and money investment upfront, causes no disruption to your full-time job, and offers significant income potential.

How much can I make, you ask? It depends on three things - The size of your database, your time commitment, and of course, the mortgage market conditions.

At InstaMortgage, we pride ourselves on our stellar reputation and proven system that carries near-zero risk for you. Join our team and start earning the income you deserve while working with a company that values your time and dedication.

Don't let this opportunity pass you by. Let's start your journey toward financial freedom today!

MORE ON [INSTAMORTGAGE.COM/CPA](https://INSTAMORTGAGE.COM/CPA)

3 reasons why you  
should seriously  
consider this opportunity

## 1. YOU ARE ALREADY A TRUSTED ADVISOR

CPAs and Tax Professionals are considered the most trusted advisors by clients. Buying a home and getting a mortgage is one of the biggest financial decisions of someone's life. They want to work with someone they like and trust. That's where you come in. Additionally, you might already be aware of their financial situation. You can offer them loan program options that are better for their financial goals and would make sense from a tax planning perspective. You are in a unique position to offer such advice and will be best suited to help them with their mortgage.

## 2. SIGNIFICANT INCOME UPSIDE

A 50bps commission on a \$700,000 loan amount is \$3,500. If you close on an average 2 such loans per month, that's an extra income of \$84,000 a year.

This is just an example. Your average loan amount can be higher or lower, or you might be able to close more than 2 loans a month.

But you get the picture. There is a significant income upside to this opportunity if you're willing to commit time and effort to this opportunity.

## 3. MINIMAL IMPACT TO YOUR FULL-TIME JOB

Prelicensing education and testing require less than 30 hours of time commitment. The investment is less than \$500.

After you get licensed, you decide how much time you want to dedicate to being a loan officer. You can slow down during your peak months (like tax season) and pick up the pace when your day job is slower.

Committing as little as just a couple of hours per week should be enough to meet your financial goals from this part-time opportunity.

# Getting Started to Getting Paid

**7-steps to more Freedom,  
Flexibility, and Financial  
Security**

# Step 1 - Pre-Licensing Education

You will need to complete a 20-hour pre-licensing education. We have a special partnership with Mortgage Educators, the leaders in mortgage licensing education, where you can complete the course at your own pace at a deeply discounted price.

## **Request your personal NMLS account**

The NMLS system is used to process MLO licensing requests. Creating an account is a simple process that only takes a few minutes to complete.

1. Visit the NMLS online registration portal to request an NMLS account.
2. Select the Individual option.
3. Provide the required information and submit your application.

# Step 2 - Pass the NMLS Mortgage Licensing Exam

Once you've completed your pre-license education, you'll need to schedule an appointment to take the National Test Component with Uniform State Content through your NMLS account.

## **SAFE MLO National Test Component**

The SAFE MLO exam covers federal mortgage-related laws, ethics, Mortgage loan originator activities, and general mortgage knowledge. Test details are as follows:

- 120 questions (115 scored)
- 190 minutes
- Cost \$110

## **Uniform State Content (UST)**

The UST portion of the exam covers:

- Regulatory authority, responsibilities and limitations
- Definitions and documents
- License law and regulation
- Compliance

## Step 3 - Become a Loan Officer at InstaMortgage

Once you have completed the required pre-licensing courses and achieved passing scores on the National and any applicable state-required tests, you will be able to apply for your mortgage loan originator license on the NMLS website.

InstaMortgage will sponsor your license. Our licensing team will work closely with you until your license is approved and you are officially a Loan Officer.

A 4-hour training customized for you will teach you everything you need to know to perform your duties as a licensed loan officer.

## Step 4 - Email campaign to your Database

From announcing your new licensing to staying in touch during the loan process to always remaining on top of your clients' mind, our email campaign on auto-pilot will take care of your marketing.

Our database management and marketing campaigns are designed by our CEO, one of the industry's top Loan Officers and Marketers. So, you get the best content and system at no cost to you.

## Step 5 - Start Originating Loans

With the Most Modern Mortgage technology, originating at InstaMortgage is easy. On our tech platform, your clients can get rate quotes, complete loan applications, submit supporting documents, and stay updated on the loan progress, all from one seamless system.

Your job is to understand their needs, provide relevant guidance, and direct them to our online technology to get started with the loan process. It's that easy.

## Step 6 - Your Relationship Manager will complete the loan process

Once you have the loan application and the supporting documents, your relationship manager at InstaMortgage will take over from you. Our internal team of Loan Officers, Processors, Underwriters, Closers, and Funders will complete the loan process.

Everyone on the team puts the needs of our customers first and strives to provide legendary service. That's why we have such stellar reviews on Google and other consumer review sites.

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## Step 7 - It's time to get Paid!

Once the loan closes, your commission will be paid within 2-weeks via direct deposit. You will be issued a W2 at the end of the year. You decide how much time you want to dedicate to this job. Highly lucrative with very little time commitment. It's that easy.

**Rinse and repeat steps 4 to 7.**



# FREQUENTLY ASKED QUESTIONS

# WHY SHOULD I WORK WITH INSTAMORTGAGE?

InstaMortgage is one of the fastest-growing companies in America, with stellar customer reviews, state-of-the-art technology, and a relentless focus on education. It has led the industry in innovation and has received some of the most prestigious business awards. The company has also been named one of the best mortgage companies to work for.

## TELL ME MORE ABOUT THE LEADERSHIP

InstaMortgage is led by Shashank Shekhar. He is a bestselling author, a sought-after keynote speaker, a top loan officer, and a podcast host. He is frequently quoted in national media for his expertise. His writings have been published in Forbes, HousingWire, Huffington Post, and Inc magazine. He was named the winner of the “2022 Entrepreneur of the Year” Stevie Awards.

## DO I GET PAID W2 OR 1099?

All our loan officers need to be employees per the guidelines. So, you will be paid a W2.

## DO I GET ANY EMPLOYER BENEFITS?

As an outside Loan Officer working part-time, you do not qualify for any benefits.

## WILL I BE PROVIDED TRAINING?

Yes, a 4-hour training session is part of the onboarding process. You will be trained for everything you need to do. And you will have access to your dedicated Relationship Manager to ask any questions or clarifications at any point in time after the training.

## IS THIS OPPORTUNITY ONLY FOR A CPA?

We do not essentially need a CPA designation. As long as you have a database of clients who trust you, there is no reason for you not to be super-successful with this opportunity.

## HOW MUCH TIME SHOULD I BUDGET FOR THIS?

Per closed client, it should require less than one hour of your time. Use the calculator on [www.InstaMortgage.com/CPA](http://www.InstaMortgage.com/CPA) to calculate the time you can expect to spend. Also, understand that you're doing it on top of your full-time job, so you have complete flexibility on how much time you want to dedicate. You can even choose to work less during your busy months and work more during slow months. Bottomline – no minimum commitment is required, so whatever works best for you. However, the more time you give to this opportunity, the more financially rewarding it will be.

## WILL I BE REIMBURSED FOR EDUCATION & TESTING?

When you close the 3rd loan with us, we will reimburse you the cost for the pre-licensing education and fees for taking the test. We only cover the cost of one test; if you failed on the first and had to re-take, we won't cover the subsequent ones.

## DO I NEED A BIG DATABASE TO BE SUCCESSFUL?

Absolutely not. While a bigger database helps to get early traction, it's not a requirement to be in this program. Our CEO closed 7 loans in his first year as a Loan Originator, and each of those 7 clients has referred businesses earning him more than \$250,000 in commissions from each of his first 7 clients. So, you can start small, put in extra effort, and use our proven effective database management and done-for-you marketing to succeed in this role.

## IS THIS COMPLIANT?

This is fully compliant, meets CFPB's Loan Officer compensation requirements, and does not violate RESPA norms. The program has been vetted by one of the top mortgage attorneys in the country. As long as you do the work explained earlier and attend 1-2 virtual company/sales meetings, you will be eligible to receive the commission in a 100% compliant way.

# Concierge-level service at InstaMortgage

Your Dedicated Relationship Manager

# Anthony Narag

Anthony Narag is the Area Sales Manager at InstaMortgage. He is also the Relationship Manager for the CPA program.


He is known for his patience and dedication to his clients, always willing to go above and beyond to ensure they find the best loan to suit their needs. As a result, he is a top producer in his company, consistently exceeding sales targets and earning recognition for his outstanding performance.



Over the course of his career, working for some of the top mortgage companies, Anthony has gained extensive experience in residential mortgage lending for primary residences, investment properties, and short-term rentals. He has also worked in commercial financing and has helped numerous businesses secure SBA loans to fund their operations.

As the Relationship Manager for this program, he will be your point of contact at every step of the way. He will guide, train, and mentor you to go from Step 1 to 7.

**Anthony can be reached at [anthony@instamortgage .com](mailto:anthony@instamortgage.com), or you can text/call him at (805) 807-3582.**



With our proven system, you can achieve more freedom, flexibility, and financial security to enjoy the things you love. Don't miss out on this life-changing opportunity!

**GET STARTED NOW**

MORE ON [INSTAMORTGAGE.COM/CPA](https://INSTAMORTGAGE.COM/CPA)

