Here’s a simple but powerful 4-step referral system mortgage pros are using to turn 1 past client into 4+ 👇

No cold calls. No awkward scripts. Just genuine connection that builds long-term trust (and steady referrals):

1️⃣ The “Grateful + Invite” Message (Right After Closing)

As soon as the deal closes, send this:

“So grateful I got to help with your home journey! If you ever know someone who’s thinking about buying, send them my way—I’ll treat them like family.”

Friendly, personal, and easy to forward.

2️⃣ The “Celebrate + Share” Social Post

Help your client celebrate with a ready-to-post message or image:

“Huge thanks to [Your Name] for helping us through the mortgage process—if you’re buying, talk to them!”

They get to brag about their win, and you get warm, authentic exposure.

3️⃣ Follow-Up with Value, Not Just “Checking In”

A few weeks later, follow up with something helpful:

“Hey! Just wanted to check in. Here’s a quick new homeowner checklist—feel free to share it with any friends thinking about buying!”

Keeps you top of mind and easy to recommend.

4️⃣ Anniversary Reminder with a Personal Touch

Set a reminder to message them at the 1-year mark:

“Happy 1-year home anniversary! 🎉 Can you believe it’s been a year already? Hope you’re loving it—and if you know anyone looking to buy in 2025, I’m always here.”

It’s thoughtful, unexpected, and timed perfectly for a referral conversation.

Repeat this system and you’ll turn every client into a long-term advocate who brings you more business—without having to chase it.

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