

How to Refer Team Aronheim



The 60-Second Referral Guide for Agents

The best referral is a fast referral. Here's exactly what to send, what happens next, and what you can expect every step of the way.

The 30-Second Referral Text

Copy this and fill in the blanks:

"Hey Jeff — connecting you with [Name].
Looking to buy [price range] in [area].
Provide any additional context you want to provide
I'll let you take it from here.

That's it. Jeff replies within the hour.

What Happens After You Text

01	<p>Step 1 — Jeff responds within the hour</p> <p>Confirms receipt, asks any clarifying questions, and lets you know if there's anything unusual about the scenario to address upfront.</p>
02	<p>Step 2 — Jeff contacts the buyer directly within the hour</p> <p>Contact the buyer to understand their situation, explain the pre-approval process and why it's important and provide them with the information to get started. Can take verbal application over the phone as well if easier for clients. We will follow up with you after that conversation and CC'd you on the next steps. No radio silence.</p>
03	<p>Step 3 – File review and pre-approval</p> <p>Once buyers submit their application and supporting documents, our Pre-Approval Specialist will verify we have sufficient documentation to validate credit, income and assets and schedule their pre-approval consultation.</p>
04	<p>Step 3 — Pre-approval consultation</p> <p>This is the critical step for developing the right strategy. During this consultation, Jeff will cover 4 key aspects: 1) the team and the process, 2) goals and expectations, 3) pre-approval review, and 4) the numbers. He builds a strategy together with the buyer — the right program, the right structure, and a plan to win the first offer they make. You will also be provided with key notes from the consultation. A pre-approval letter will be issued that factors in the strategy.</p>

05	Step 4 — House Hunting Support you and the buyer as you find homes they like. We will run numbers and issue pre-approval letters specific to each property you make an offer. We develop strategies with you and contact the listing agent directly to help you WIN!
06	Step 5 — You're in the loop throughout Milestone updates go to you at every stage: submission, approval, clear to close, funding. You never have to chase us.

How to Introduce Jeff to Your Buyer

By Text or Email "I'd like to connect you with Jeff Aronheim, my preferred lender. He's known for getting creative on tough deals and always picks up. Text him at 720-200-5464 — he'll take great care of you."	In Person "Before we go any further, I want to make sure you work with someone I trust completely. Jeff at CrossCountry is the best — fast pre-approvals, always available, and he figures out deals other lenders can't."
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What You Can Always Expect From Jeff

- ✓ Same-day response on every pre-approval request
- ✓ Deal Desk available 7 days a week — texts answered on weekends
- ✓ You're CC'd when Jeff first contacts your buyer
- ✓ Automatic milestone updates — you're never the last to know
- ✓ Jeff calls listing agents personally when it helps your offer win
- ✓ If we can't do the loan, we'll tell you why — fast

Ready to Refer Us?
Text Jeff the scenario now — he'll take it from there.



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