

Checklist For Starting a Mortgage Brokerage

Business Planning

- Conduct market research
- Write a business plan
- Determine business structure
- Choose a business name

Legal Requirements

- Register your business
- Comply with regulations
- Get an EIN
- Create a Lean Canvas

Office Setup

- Choose a business location
- Set up an office
- Invest in office equipment
- Arrange utilities and services

Technology and Tools

- Select mortgage brokerage software
- Set up a professional website
- Use CRM for client management
- Implement cybersecurity measures

Marketing and Sales

- Develop marketing strategies
- Create promotional materials
- Build a professional network
- Plan client acquisition strategies

Finance Management

- Set up accounting software
- Plan budget and manage cash flow
- Hire an accountant
- Prepare for tax obligations

Staffing

- Hire qualified brokers
- Train staff
- Set up payroll systems
- Implement HR policies

Go-to Resources for Starting a Mortgage Brokerage

Brokerage Tools

- [Jungo](#)
- [Calyx Software](#)
- [Ellie Mae](#)

Marketing Tools

- [Google Ads](#)
- [Facebook Business](#)
- [LinkedIn Ads](#)

Business & Accounting

- [ZenBusiness](#)
- [Northwest Registered Agent](#)
- [FreshBooks](#)
- [MyCorporation](#)

Useful Tools

- [Invoice Generator](#)
- [Lean Canvas Generator](#)

*All of the resources are clickable links