

Building lasting, lucrative relationships
with FirstPersonSM



**TARGETED
MARKETING**

**THAT WORKS
FOR YOU**

FIRST PERSONSM
A First Horizon Marketing Services Program.

 **FIRST
HORIZON.**
All Things Financial.

Introducing First Person



It doesn't matter if you're new to the industry or a 30-year veteran...First PersonSM can help you build lasting loyalty with your broker associates and form lucrative new business relationships. Part of First Horizon's National Marketing department, the First Person direct marketing program features invaluable tools.

- Postcards, greeting cards and premium mailings. All are easy to personalize and make positive, lasting impressions.
- Membership services that include direct mailing services, up to 60% savings on First Person materials, and online contact management.
- Subscription options so you can set up automatic delivery for postcards, birthday cards and Business Referral Campaign mailings.
- 24-hour online access so you can browse First Person products and place orders at any time.
- Training via conference call that helps you get started with First Person, learn all about database management, and more.

Proven Results

- 78% of the top 25% of Relationship Managers use First Person regularly
- First Person users produce more than 70% of the company's total retail volume
- Users enjoy more repeat business from customers – 53%, compared to 41% for non-users

How First Person works for you



To reach the top in our industry, it's vital to stay "top of mind" all year round with customers, business associates and prospects. First Person is designed to help you do this easily and affordably, by providing you with everything you need to design your own personalized marketing campaigns.

For example, you can send monthly recipes or quarterly newsletters - or both - to your borrower database. When someone on your First Person mailing list decides to refinance, apply for a HELOC, or is asked for a referral to a local mortgage expert, you'll be the first person they think of.

Here are just a few ways you can grow your business with First Person - strategies that have been proven to work by some of our top producers:

- Tell your borrowers about our home equity and banking products
- Invite new customers to complete a survey about their home loan experience
- Send thanks to your best referral sources and ask for more business
- Send holiday and birthday wishes to borrowers, prospects and business associates

- Thank your borrowers for choosing you to handle their home's financing
- Explain to prospects why it's smarter to buy a home than to rent an apartment



If you're not a member of First Person, you're losing business. It's that simple.

- Ryan Bucholdt, Capitola, CA

Easy Networking

Want to turn potential business associates into new income sources? Our Business Referral Campaign gets your foot in the door and your name "top of mind". Each mailing arrives with an attention-getting premium and catchy promotional message - and they work! Users tell us about the calls they receive immediately after each premium is delivered. A second Consumer version is produced quarterly for consumers who have referred new business to you.

Unlock First Person's Power



When you become a member of First Person, you'll receive a range of professional database management services. For just \$50 a month, you'll receive:

- Access to a detailed personal address book with over 75 data fields per contact. For example, you can view information about a borrower's banking habits, mortgage product info, birthday, REALTOR®, and much more.
- An address book tool that enable you to sort, search and update your records easily and quickly
- Pre-built Marketing Opportunity queries that help you identify and focus on key sales opportunities.
- Automatic monthly uploads of new borrowers' product and contact updates include details of their first/second liens, plus deposit accounts as applicable
- Services and support from our database management team via the Data Request function
- Time-saving automated mailing services - no more printing labels or sticking stamps
- Members-only discounts of up to 60% when you order First Person materials

My Customers Database

The My Customers database provides members with an instant breakdown of borrower stats and automatically identifies potential marketing opportunities.

Get face time every time

Almost every First Person product can be highly personalized, right down to your full-color photo and personal signature. Up to 15 lines of personalization give you plenty of room to add what you like - including a favorite sales slogan or personal motto.

Need Help?

Call our Customer Care team at (877) 822-2737, join a training call, or call your Regional Marketing Manager for advice and assistance with designing your own marketing strategies that incorporate First Person.



Top 5 Favorite Features



#1 Ready, set, mail!

Did you know that you can export your contacts' names and addresses directly from your First Person database for mailing labels? It's a fast, accurate way to prepare a mailing. Simply go to Membership, click on View Contacts, select a group or individual and click Export. When prompted, choose the Avery Label option.

#2 Can't remember your last order? No problem!

With First Person, just log in and go to My Profile>My Transactions to look up details of your previous orders. It's an easy way to ensure you don't mail the same message twice.

#3 Order only what you need

First Person products have no minimum quantity requirements. Order 5, 50, 500 or 5,000 ... whatever's right for your marketing strategy and budget.

#4 Easier MEA expense claims

Don't worry about losing your First Person receipts. You can print your transaction and membership fee receipts at the same time you're completing your monthly MEA expense claim. Simply log in, then go to My Profile>My Transactions to locate and print your receipts.

#5 Build goodwill all year long - automatically

Set up your subscriptions for important future mailings, such as Business Referral Campaign premiums and Annual Surveys, months in advance. Then relax - they'll all be delivered on time, every time.

Why it's vital to stay "top of mind"

- According to Mortgage Banking News, 75% of mortgage customers cannot recall the name of their loan officer six months after closing.
- According to Mortgage Banking News, loan officers who regularly utilize retention marketing materials close 52% more loans than those who don't.

What Next?



Sign up!

Log into the employee intranet at www.fhintranet.com and click on the First Person Quick Link at top right.

1. Register for a new account or log in.
2. Sign up for Membership Services, click on Membership and complete the form.
3. Set up your personalization by completing up to 15 lines of contact details and personal information. Next, submit your photo and signature. Instructions can be found by clicking on My Profile and proceeding to My Personalization. After you're done, click Update and your details will be saved for when you're ready to order. Please allow 48 hours for photo submission.
4. Enjoy browsing through the products and deciding on a personal marketing strategy, then place your order.

We're always expanding

The home loan market keeps changing – and so does First Person's library, home to hundreds of communications. Look for monthly announcements by logging into First Person and clicking on the "What's New?" link.

Help yourself to some First Person samples.

