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MARCH 2020

Written by **Heather Pluard**.
Photos by **Kelly
Klemmensen**
Photography.

DANIEL JACOBS

is Bringing **JOY** to the
Mix of the Mortgage
Loan Process!

IT'S A SIMPLE THOUGHT THAT HAS A POSITIVE IMPACT: People should love their home loan process as much as they love their new home. That's the reason Daniel Jacobs and his partners started TruLoan Mortgage, a boutique mortgage banking firm that is committed to making the entire loan process enjoyable.

"Helping people with a major moment in life is so gratifying," says Daniel. "TruLoan Mortgage was born out of a desire to take what we were doing on a national level and apply it locally. Lending has changed. We wanted to help grow our community here in the Charlotte area and deliver an enjoyable process."

Daniel started his career as a loan originator, working his way up to management, eventually leading a regional company into a national, \$4 billion per year, mortgage lender. He was named to the industry's '40 Under 40 to Watch' early in his career. Recently, Progress in Lending awarded him the 'Mortgage Luminary' designation. He and his partners, Brenda



Jarvis and Matt Wise launched TruLoan Mortgage last year.

Brenda has a wealth of experience in business development for national mortgage brands. She loves working closely with the local community and leveraging her MBA in analyzing current market trends. "TruLoan Mortgage is hyperfocused on deadlines and customizing the client's experience," she says. "Day or night, in-person or over the phone, we will do business on your terms."

Matt also believes in creating award-winning customer experiences. "I went into banking after graduating with a degree in economics from UNCC," he says. "After working for national banks for years, I'm now focused on serving my Charlotte community. At TruLoan Mortgage, we underwrite in-house and fund our loans, so we have control over the entire process."

Clients rave about TruLoan Mortgage, evidenced by their 4.9-star average client ratings. "Referrals are our bread and butter, and working with multiple generations

within a family is one of the most gratifying compliments we can receive," says Matt. "We see a changing trend of home-buying, including would-be empty nesters moving into multi-generational homes as much as young buyers buying condos along the light rail. Each buyer has unique circumstances and lending needs that our team enjoys addressing."

Millennials are quickly becoming a significant fan base. "Homeowners typically build 44-times the wealth of renters, but millennials are waiting longer to buy their first home," Daniel explains. "The average age used to be 26. Now it's 33. Factors including concerns over student debt, watching their parents struggle through the housing crisis, and misconceptions about home loans often make millennials hesitate and miss out on a lot of years of wealth building."

The TruLoan Mortgage team is addressing these concerns with an educational series. "We're combining our expertise with other



homebuying professionals and meeting in local spots, hosting panel discussions with real talk about homeownership,” Daniel says. “We’re myth-busting and educating, not selling.” These town-halls regularly attract 40-50 attendees.

The TruLoan Mortgage approach is about building trust and focusing on relationships, not transactions. They offer a Lunch & Learn series for real estate agents. “We discuss various topics, including using social media, ways to grow your business, and how REALTORS® can best save for retirement as independent contractors,” Daniel says. “We love to explain what goes on behind the scenes in the mortgage industry and demystify the process. Understanding why things happen helps everyone to partner. The more knowledgeable all parties are about the homebuying process, the more the American Dream is realized within our community.”



“You’re dealing with people no matter what,” Brenda says. “Address their needs, communicate well, provide value and customize their experience. That’s how we are building a lending experience that everyone loves.”

“People often ask us what sets us apart,” says Daniel. “Similar to REALTORS®, who are all working with the same inventory of houses, we’re generally working with the same loan products as the competition. What sets us apart is how our clients feel about their home lending journey. Our actions are governed by the Maya Angelou quote that ‘people won’t remember what you did, people won’t remember what you said, but they will always remember how you made them feel.’”

“People won’t remember what you did, people won’t remember what you said, but they will always remember how you made them feel.”
- MAYA ANGELOU



REALTORS® interested in participating in TruLoan Mortgage’s lunch and learn series or homebuyer workshops can contact Daniel Jacobs at djacobs@mytruloan.com.

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Daniel Jacobs
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Brenda Jarvis
EVP

Matt Wise
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