



TruLoan Mortgage

The Lending Experience You'll Love

By Contributing Writer **Andrea Powell**



When anyone brings up real estate these days, the conversation turns to housing prices, inventory, buyer's or seller's markets, and soaring home offers and prices. For many, obtaining the right mortgage financing has become secondary to simply finding a home. But, unless you have cash to pay for the home in full, acquiring a mortgage is one of the most critical parts of buying a house. And if you want the mortgage process to be easy — to be a lending experience you'll love as much as starting a new life in a new home — you should contact local lender TruLoan Mortgage.

TruLoan Mortgage opened its doors in 2019. The brainchild of Daniel Jacobs, Brenda Jarvis, and Matt Wise, the three have over 50 years in the industry and were looking for a way to improve the lending experience

for customers. "We wanted clients to have a level of service without all the red tape that so many mortgage lenders allow to erode the experience," Daniel reflects. "We created TruLoan Mortgage with the idea of providing the lending experience clients will love." Beginning with just four employees, the company has since grown to 23 and operates in Charlotte, Atlanta, Nashville, and beyond. They are licensed in 12 states.

Getting a new business off the ground during the pandemic would seem disastrous, but in fact, it turned out to have unexpected benefits. "We leveraged technology in a way that still created a high touch, personalized experience," Matt explains. They used Zoom for meetings and to continue their homebuyer and REALTOR® education series virtually. "We were hosting them in breweries before the pandemic, and we wanted to keep them fun and interactive. Since we couldn't be live, we selected a local brewery and gave out gift cards to

attendees so they could still support the brewery when they felt comfortable. By continuing education, supporting local businesses and hospitality, and servicing our clients, we furthered our mission to provide a local, boutique experience."

TruLoan acknowledges that customers want to do business on their own terms, and they make every effort to accommodate. "The pandemic only shined a spotlight on the need to be very flexible from moment to moment," says Daniel. "We've crafted an experience that allows clients to self-select the type and timing of interactions they want with a mortgage process that fits their lives." That includes streamlining documentation, a process that can otherwise be time-consuming or frustrating. TruLoan has integrated their process with most of the institutions customers use for documents, including tax returns, W2s, and bank statements. With just a few clicks, items can be accessed quickly in a secure

environment. TruLoan's focus on both systems and personal service is the nexus of high tech and high touch.

The TruLoan team is also dedicated to ensuring clients' offers are accepted once they find their dream homes. They have an in-depth consultation to explain what the homebuying journey will look like in terms of financing. "You'll have a comprehensive plan in place, so when you go shopping, you can confidently focus on finding a house to call home," Daniel states. And Daniel's advice once that happens? "Only offer on homes you really like and want to live in. Likewise, when you find a place you really love, make sure your offer is as aggressive as you are comfortable with to win the bid, without regret."

The team approach at TruLoan sets them apart from other mortgage companies. Rather than assigning a lone individual as the only point of contact for a client, TruLoan structures a

team with assigned roles to help with consistency across the experience. "Even the best loan officer in the world has days off for vacation or sick time. If a single point of contact is not available, it shouldn't have to cause anxiety to the client," Brenda acknowledges. "Here, everyone works together. When one person is out, another member is here. It's just an additional way to create the lending experience our clients will love."

What's more, TruLoan Mortgage prioritizes relationships with both clients and the community, holding customer appreciation events such as family fun days at local parks to celebrate the many advantages Charlotte offers. That's because TruLoan is committed to making the lending process enjoyable as well. They keep communication lines open and provide updates every step of the way, ultimately making buying a home a fun endeavor from start to finish. And, in lieu of being able to just write

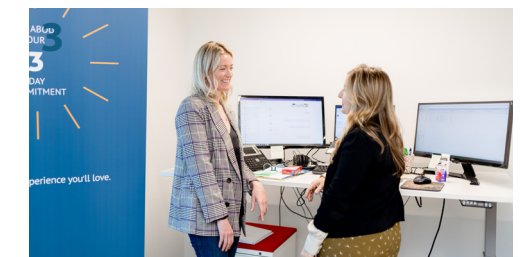
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For information, call 704-703-8229, email info@mytruloan.com, or visit truloanmortgage.com.



To have your business featured in an upcoming issue, please email **Zane Odom** at zane.odom@n2pub.com.

1. The TruLoan Mortgage Team (Top, L to R): Matt Wise, Isaac Solis, Sebastian Mora, Brenda Jarvis, Alan Jacobs, Daniel Jacobs, and Carlos Delgado. (Bottom, L to R): Lauren Mitchell, Bailey Holmes, Courtney Harris, Susan Searcy, Deanna Bryant, and Brandi Blunden.
2. Taking the time to understand your financial goals
3. Our team works REALTOR® hours, not banker hours.
4. Founding Partners (L to R): Daniel Jacobs, Matt Wise, and Brenda Jarvis
5. Technology to apply, when you want, how you want, on your own terms





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