



Mortgage by Design™



Planning Pyramid™

- The Mortgage by Design™ program is a unique experience that provides clarity, focus, and confidence to families throughout the mortgage process.
- The Planning Pyramid provides a clear understanding of what is most important to a borrower both personally and financially.
- Each borrower's unique, short and long-term, personal and financial goals are integrated with the available financing options.
- Creating a strategic mortgage plan *by design*.
- A commitment to help each family manage their mortgage plan over time.