

SPOKANE

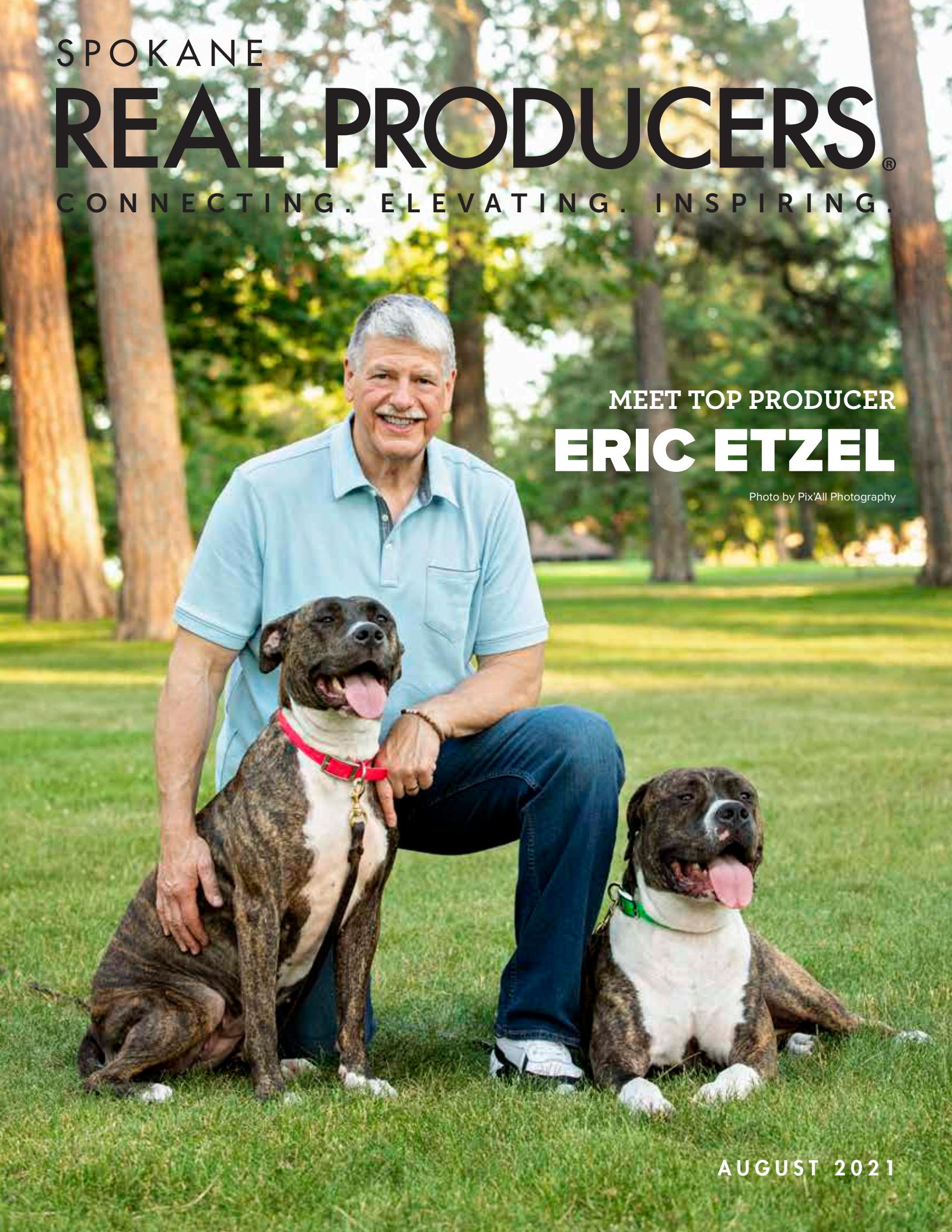
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AUGUST 2021

(Left to right) Shelby Arthur, Eric Holman, Courtney Carlone, and Jackie Knight.



Courtney Carlone, Sales Manager



Eric Holman, Account Manager



Shelby Arthur, Account Manager

“We followed all the protocols and got complimented quite a bit,” Courtney says. “Our customers told us the in-person signings while following protocol were preferred over car signings that some of our competitors were doing. We actually picked up market share.”

She credits Portland-based WFG, which acquired Cataldo and four other Eastern Washington offices in April 2018, with providing the preparation, products, and infrastructure that made this possible.

“Our leadership is so forward-thinking,” she says. “We had an emergency plan in place so we were pretty much set up to just keep going forward through the pandemic. Our ResWare platform and how we do business in general were part of why we stood out in comparison to others in our market.”

It was more proof for Courtney that the WFG acquisition had been good for Cataldo and the other four offices located in Omak, Winthrop, Mullan, and Bernard. (Bernard has since merged with Cataldo.)

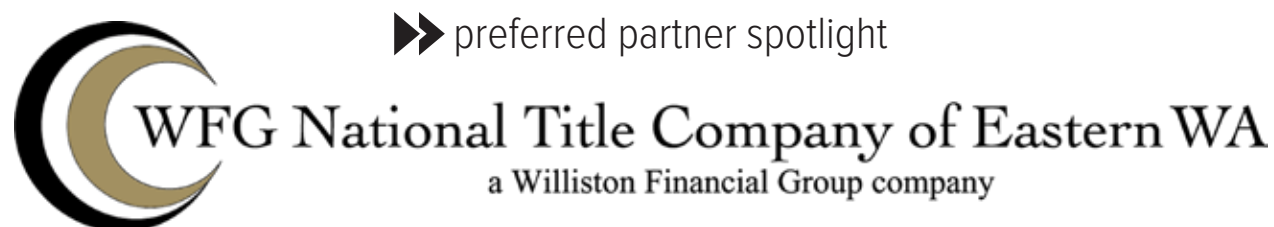
Originally from Omak, a small town in sparsely populated Okanogan County, Courtney’s roots are in the close-knit communities where personal relationships are the basis of business relations. She has worked in the title business since she was 17, having fallen in love with it at a summer job while attending Eastern Washington University, where she would earn degrees in Human Resources, Marketing and Business.

“I was in closing for a while, and now I’ve been in sales for 11 years,” she says. She is accompanied by a solid team of three – **Shelby Arthur, Jackie Knight** and **Eric Holman** – who all

bring a strong work ethic and passion for the job.

The Eastern Washington offices each have experienced industry professionals leading their closing teams: **Katie McCaslin, Teri Hollis, Emily Stewart** and **Melissa Stone** at the Cataldo location; **Paige Willingham, Toni Whittam** in Mullan; **Katlenia Vejraska** and **Rene Clark** in Omak; and **Tracy Gariano** in Winthrop.

Three years ago, Courtney was concerned that the small town, family-first culture the Inland Professional Title team had nurtured would be sacrificed to corporate demands from WFG. But those worries were quickly eased by WFG’s Founder and Executive Chairman, **Patrick Stone**. “Pat Stone actually called me on the first day and said, ‘Hey, I hear you’re having some hesitations. I just want to reassure you ...’” He went on to say



▶▶ preferred partner spotlight

Meet WFG National Title Co. of Eastern Washington

Combining small town relationships with national resources

Courtney Carlone, Sales Manager of WFG National Title Company of Eastern Washington, believes it was a combination of tech and teamwork that allowed the offices to remain operational through the worst of the COVID-19 pandemic. While competitors closed shop and shifted to car signings, WFG’s team was “a small, tight-knit group that agreed to work in the office.”



Jackie Knight, Account Manager

he knew and appreciated what the Eastern Washington offices were doing and pledged to support it. His words would ring true, and Courtney’s cell phone would ring regularly.

“He reaches out on a regular basis,” she says. “He really does know exactly who I am, exactly who Spokane is and what we’re doing here. I’ve never been asked so often, ‘What can we do to help you be more successful?’ That’s truly what every meeting is about.”

Small town relations, national resources

Since the acquisition, Cataldo’s technological component has shifted from underdeveloped to ahead-of-the-curve. They are now able to offer their clients the latest title products and services, and recommend other innovations developed by WFG. Two recent releases that are currently



Katie McCaslin, Branch Manager

helping them make a greater market impact are **FETCH by WFG** and **MyHome®**. “We get a ton of positive feedback on both MyHome® and FETCH,” Courtney says. “FETCH has been a really big thing since we introduced it in January. People are loving it.”

The appeal of FETCH is that it combines multiple property-information platforms into a single platform that agents can easily access for quick, comprehensive map-based searching. It generates information on either individual properties or larger target areas from which users can calculate title and escrow rates, and create instant net sheet calculations with the tax, mortgage, lien data and more already filled in automatically.

“There’s nothing else like it in our market,” she says. “Because listings are so hard to get in this market,



Terry Hollis, LPO

people are going back to farming and doing it on their own. And FETCH has a mechanism to generate phone numbers and email addresses that they just don’t have access to anywhere else. Another awesome feature is that our net sheet is the easiest to use, and people want to be able to do it on their own, largely because they’re doing it after hours and they like having the option to just get it done.”

A solution to communications breakdown

The enhanced MyHome® release comes during a year in which WFG has intensified its efforts to identify and overcome the biggest challenges facing real estate, mortgage, and title professionals. Working with an Executive Roundtable of industry leaders from across the country, WFG determined that communications remain a key concern.

“One of the biggest complaints in this industry has always been about communication,” Courtney confirms. “Consumers complain about a chronic inability to get a hold of the closer or others, and we are making it a priority at WFG to change that.”

Here again was an example of how Eastern Washington’s office strategies



Emily Stewart, LPO

combined with WFG’s tech support to offer a winning solution. First, the team adjusted how incoming communication is disseminated.

“We created closing teams along with team emails so there are several eyes on each file, each of whom is willing and able to help,” she says. “We actually started that model here in Spokane when we became WFG. Every message that comes in now goes to all five team member emails. If the closer’s not available, she’s got her team pulling, and answering, and pulling, and answering, which allows her more time to finish closings and other demands.”

“That has made the process go phenomenally well,” she continues. “And, if consumers do not want to talk to anyone, the backup is MyHome®. Its helped communication cease to be a factor. Complaints are down to nearly zero, and I attribute that to the way

we set up our teams and how we are using MyHome®.”

So, by maintaining a community-centric office culture that works so efficiently and integrating the support and innovation now available through the acquisition, WFG of Eastern Washington not only survived the pandemic, it surged ahead.

“The pendulum is definitely swinging forward,” she says. “We’ve significantly grown our operation, are building new offices, and our team is expanding. Our market share’s growing as well, and people are excited to work for WFG,” Courtney adds. “I truly do believe it’s the best mix of small business, family-first customer relations, with the big national powerhouse tools to back us up.”



Melissa Stone, Branch Manager/LPO



Paige Willingham, Branch Manager/LPO



Kevin Ferguson, County Manager