Everborn Productions

CLIENT INTAKE PACKET · FILLABLE

# Tell us how your business runs.

## Credit Repair

Everything we need to build the system to how you actually sell. Fill in what you know; leave blank what you don't. Anything left blank is a question for the intake call, not an assumption we'll invent.

About two hours in week one. The builder reads every line, and the fields feed the variable sheet the build runs from.

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BEFORE WE START

## Which package, and who we are dealing with.

- ☐ **Launch** — $3,500 + $697/mo — Every lead answered fast
- ☐ **Growth** — $6,500 + $1,197/mo — Plus The Dispute-Cycle Engine
- ☐ **Full Engine** — $9,500 + $1,697/mo — Plus partners and the think-tank

| | |
|---|---|
| **Your name** | **Title** |
| **Email** | **Cell** |
| **Business name** | **Website** |
| **Date** | **Referred by (rep or partner, if any)** |

- ☐ We already own our own HighLevel account
- ☐ Regulated industry: book the week-one compliance review
- ☐ Domain, business email and phone already exist
- ☐ Starting from zero: set up domain, email and phone

### How to use this packet

Type directly into the boxes and save, or print and write. Checkboxes mark what is true today. The last page is the sign-off that confirms what we'll build. Nothing in this packet asks for passwords, account numbers, or anyone's personal identifiers — we never collect those by form or email.

SECTION 1 OF 12

## The company

The basics about your company, including your state registration and bond. Copy the registration number and bond amount straight off the actual documents. Georgia residents cannot be enrolled, so the funnel blocks them, and monthly billing has to be charged after the work is done.

**Legal name and DBA**

**State of operation and states served**

**CSO registration number and surety bond amount**
Read these off the physical certificate and bond, not from memory.

**Owner, reps, processors**

**Active client count and monthly fee**

- [ ] Registration and bond documents in hand
- [ ] Georgia geo-fence approved
- [ ] Monthly billing is in arrears

SECTION 2 OF 12

## Reps and processors

Everyone who takes consults. We use this for the round-robin, the booking calendars and the per-rep landing pages. The claim window is how long a rep has to grab a new lead before it moves to the next person.

**Reps — name, cell and email, one per line**

**Round-robin order and claim window**
The rotation order and how many minutes a rep has to accept a lead before it rolls on. 5 is typical.

**Consult length and calendar rules**
For example: 30-minute consults, Mon-Fri 9-6, no same-day bookings.

- [ ] Each rep has a booking calendar
- [ ] Per-rep landing pages approved

## SECTION 3 OF 12 Dispute software

We connect your dispute platform to the CRM so client progress flows through automatically. Scores land in hidden fields only and sensitive data is stripped before it moves.

**Platform (DisputeFox, Credit Repair Cloud, CDM)**

**Fields to sync (status, stage, round, items, scores)**
Status, stage, dispute round, items removed and remaining, and scores. Cross out any you do not want synced.

**Zapier or API access**

- [ ] Sensitive-data stripping on
- [ ] Scores land in hidden fields only
- [ ] Onboarding workflow unpublished before the first Zap test

## SECTION 4 OF 12 Phone and email

Carriers do not allow credit repair companies to send marketing texts, so this build runs on email and voice. We set up your tracked line and voicemail drop, review your Trust Center and prepare a written texting recommendation you can decide on.

**Main line**

**Domain and business email**

**Voicemail drop script**
The 20-second message left when a new lead does not answer. We can draft one if you leave this blank.

**Trust Center status**
Whether your business has been verified in Twilio's Trust Center. Write 'not started' if unsure.

- [ ] No SMS sold or promised
- [ ] Written A2P recommendation delivered; client submits nothing misrepresenting the business
- [ ] Address and unsubscribe on every email

## SECTION 5 OF 12 Lead sources

Where leads come from and what each source costs a month. Meta ads for credit services have to run under the financial Special Ad Category, and no ad can promise score points or a timeline.

**Meta ad account and lead forms**

**Site forms**

**Purchased leads or affiliates**

**Organic social channels**

- [ ] Meta ads declared in the financial Special Ad Category
- [ ] No score-point claims or timelines in ad copy
- [ ] Source tag list confirmed

## SECTION 6 OF 12 Enrollment packet

Federal law requires a specific contract, a state information statement and a cancellation notice before any work starts, and you cannot bill until work is done. Tell us which versions you use and your state's cancellation window.

**CROA contract version**

**State information statement**

**Notice of cancellation**

**Cancellation window for this state**
Federal minimum is 3 business days; some states allow longer.

**First-work date rule**
How you define the day work starts, for example the day the first dispute letter is sent. Billing cannot start before it.

- [ ] Packet reviewed by counsel
- [ ] Contract copies retained 2 years (California)
- [ ] First bill scheduled only after work starts

## SECTION 7 OF 12 Client communications

How clients hear about progress. Reports go out on your round cadence and never include a score in the message body; the standing disclaimer sits on every template.

**Round cadence (30-45 days)**
How often a new dispute round goes out. Usually 30 to 45 days.

**Progress report format and subject line**

**Portal link**

**Owner CC address**

- [ ] No score in any message body
- [ ] Standing disclaimer on every template
- [ ] Banned-phrase list loaded

## SECTION 8 OF 12 Billing and retention

How clients are charged and what happens when a payment fails or someone wants to cancel. Decline follow-up runs on email and voice only. Win-back offers have to stay inside CROA, so a pause is fine but a free month billed in advance is not.

**Processor and payment link**

**Pre-bill notice timing**
How many days before the charge the client gets a heads-up email. 3 is common.

**Save-lane owner**
The person who calls clients who ask to cancel.

**Win-back offer within CROA limits (pause, not a free month in advance)**

- [ ] Decline sequence is email and voice only
- [ ] Saves report recipient named

SECTION 9 OF 12

## Greenlight and partners

Greenlight is the handback: when a client hits your internal threshold, the partner who referred them gets a first-name notification that the client is ready to return. The threshold never appears anywhere, partner statements show counts and fees only, and partners never send you a credit application or bureau pull.

**Internal threshold (script constant, never displayed)**
The score or milestone that means 'ready to go back to the dealer or lender'. Only you and we ever see this number.

**Dealers, apartment communities, tax preparers and their fee tiers**
Partner name, contact and what they pay per referral, one per line.

**LOs, realtors and attorneys on the no-fee variant**

**Counter card version and contacts**

- [ ] Statements carry counts and fee lines, never scores or thresholds
- [ ] Dealer agreement reviewed once per state
- [ ] Consumer release language for first-name notification in the contract
- [ ] No credit application or bureau pull accepted from any partner

SECTION 10 OF 12

## Re-activation list

Old leads you want to email again. We ramp the send volume slowly, filter out states you cannot serve and run a tiny dry run first so your domain reputation stays clean.

**Old lead list size and source**

**Allowed states filter**
States you are registered to serve. Everyone else is excluded. Georgia is always excluded.

**Send window and daily ramp**
Days and hours to send, and how fast to grow the daily volume, for example 50 a day rising to 500 over two weeks.

- [ ] Bounce guard thresholds set
- [ ] Dry run with a tiny cap
- [ ] Unsubscribe handling confirmed

## SECTION 11 OF 12 Compliance

Who reviews templates and where consent and disclosure records are kept. Nothing goes live before the week-one compliance review, no advance fees are taken over the phone, and CPN or new-credit-file language is banned everywhere.

**Counsel or compliance reviewer**

**Consent and disclosure log location in Drive**
A folder where signed contracts, consents and disclosures are filed. We create it if you do not have one.

- [ ] Compliance review booked in week one
- [ ] TSR posture confirmed (no advance fees on phone sales)
- [ ] No CPN or new-credit-file language anywhere

## SECTION 12 OF 12 Reporting

When the owner's report goes out, who gets it and who can see the dashboard.

**Owner's report day and recipients**

**Dashboard viewers**

- [ ] Leads by source, booked, enrolled, cancelled and revenue wanted

THE NEVER-LIST FOR CREDIT REPAIR

## What our automations will never say.

Tick each line to confirm you've read it. These are the rules every template is checked against before it goes live.

- [ ] Score promises or point ranges (raise your score 100 points) and any timeline for results (in 30, 60 or 90 days).
- [ ] Remove accurate items, delete collections, clean slate, guaranteed, legally remove, we work with the bureaus.
- [ ] A client's score, score band, or the greenlight threshold, in any message or partner document.
- [ ] Advice to dispute items the client knows are accurate; a CPN or new credit file.
- [ ] Any statement that the partner's loan or car deal will be approved.
- [ ] Any fee requested or received before the service is performed; a setup fee at signing.
- [ ] A client's report contents, items disputed or removed, or enrollment date tied to a name in anything a partner receives.
- [ ] SMS delivery of any kind on 10DLC or toll-free.
- [ ] Enrolling a Georgia resident.
- [ ] Fix your credit, erase bad credit, credit sweep, credit hack, offering to text the whole list.

ANYTHING ELSE

## What we didn't ask.

**The three tasks eating the most time each week**

**What a great first 90 days looks like**

**Tools we already pay for (and which ones we actually use)**

**Anything else we should know**

SIGN-OFF

## This is what we'll build.

By signing you confirm the package chosen on page 1, that the information in this packet is accurate to the best of your knowledge, and that every automated template will be reviewed by your compliance contact before it goes live.

**Signature**

**Date**

**Printed name**

**Title**

### What happens next

Within two business days you get a one-page brief and a fixed quote. Week one is intake and foundation; week four is handoff. everbornproductions@gmail.com · (916) 541-3415.