Everborn Productions

CLIENT INTAKE PACKET · FILLABLE

Tell us how your business runs.

Mortgage & Lending

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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September 2026

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 Loan File 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 11

The shop

The basics about your company so we set up the account, the brand registration and the footers correctly. Copy names and numbers exactly as they appear on your licenses.

Legal name and DBA as registered

Company NMLS ID

States licensed in

Broker or banker; wholesale or retail

Broker, banker or both, and whether you sell wholesale, retail or both.

Number of LOs, processors, LOAs

Loans funded last 12 months

A round number is fine. We use it to size the database work.

- [ ] Equal Housing Lender mark on hand
- [ ] State license disclosures per state on hand

SECTION 2 OF 11

Loan officers

List everyone who takes leads. We use this to set up the round-robin, their booking calendars and their email signatures. The claim window is how long an LO has to accept a new lead before it passes to the next person.

Loan officers — name, NMLS ID, cell and email, one per line

Round-robin order

Claim window in minutes

How long one person has to grab a new lead before it moves to the next person in line. 5 is typical.

- [ ] Each LO has a booking calendar
- [ ] Each LO's email signature carries NMLS ID

SECTION 3 OF 11

Systems of record

Tell us which software already holds your files and pricing. We build alongside your LOS and never write into it, so we need to know where the lines are.

LOS (Encompass, Calyx, LendingPad, BytePro, Arive)

Existing CRM, if any

Pricing engine

E-sign tool for non-LOS items
DocuSign, Dropbox Sign, etc. Only for things like referral agreements, not disclosures.

- [ ] We never write to the LOS
- [ ] Disclosures, 1003, credit and CD stay in the LOS

SECTION 4 OF 11

Lead sources

Where your business comes from today, with rough monthly numbers. Every lead gets tagged by source so the owner's report can show cost per funded loan. Trigger leads are not allowed in this build, so that line must be zero.

Agent referrals per month

Past-client and sphere referrals

Website form fills

Paid digital budget

Aggregator leads (Zillow, LendingTree, Bankrate)
Monthly spend or lead count per site. Write 'none' if you do not buy them.

- [ ] Any trigger-lead budget still in the forecast (must be zero)
- [ ] Source tag list confirmed

SECTION 5 OF 11

Pipeline stages

We ship a standard set of stages. Rename any that do not match how your team talks, and tell us who is responsible when a file sits in each one.

Confirm or rename each stage

What counts as Past Client

For example: any borrower who funded with us, or only the last 5 years.

Who owns which stage

- [ ] Stages match how the shop talks
- [ ] Not Yet lane approved

SECTION 6 OF 11

Conditions and milestones

This drives the automatic needs-list reminders and the milestone updates that go to the borrower and both agents. Give us the list you already use so the messages sound like your shop.

Standard needs list by loan type

Conventional, FHA, VA, jumbo, etc. Attach your existing checklist if you have one.

Milestone list the shop uses

Who receives each milestone (borrower, buyer's agent, listing agent)

Reminder ladder timing

How often to nudge for missing conditions, e.g. day 1, day 3, day 5, then a call.

- ☐ Milestone copy contains no rate, payment or approval language
- ☐ Secure upload link provider confirmed

SECTION 7 OF 11

Partners

Your referral relationships. We set each partner up with their own link and a monthly activity report that shows service level only, never anything of value tied to referrals. Any existing MSA or co-marketing deal goes to your counsel before we touch it.

Top 10 referring agents
Name, brokerage, cell and email. One per line.

Builders, CPAs, advisors, attorneys, title contacts

Any existing MSA or co-marketing arrangement

Counsel who reviews MSAs

- [ ] No partner receives money, gifts or free services tied to referrals
- [ ] Partner Activity Report is service level only
- [ ] Existing arrangements sent to counsel

SECTION 8 OF 11

Database

Your past-client list is the biggest asset in this build. Tell us where it lives, what fields it has and whether those people agreed to be contacted, so we know which channels we can use.

Past-client list size and source

Loan anniversary and note-rate fields available
Yes or no. These drive the anniversary and rate-watch touches.

Consent status of the list
Did these people opt in to texts and emails? If you are not sure, say so and we default to email only.

- [ ] No trigger-lead-sourced contacts in the list
- [ ] Consent evidence exists for texting

SECTION 9 OF 11 Compliance

Who signs off on templates and where we keep the ad archive. Nothing goes live before the compliance review in week one.

Compliance officer or counsel name

Template approval process

Blocked-phrase list additions

Words your compliance officer never wants in a message. We already block rate, payment and approval language.

Ad archive location

A Drive folder is fine. Regulators can ask for 24 months of marketing.

- [ ] Compliance review booked in week one
- [ ] Universal STOP honored across all workflows
- [ ] 24-month archive enabled
- [ ] Adverse action stays out of the CRM

SECTION 10 OF 11 Phone and texting

What we need to set up your tracked number and register it for texting. The carriers approve the registration faster when the privacy policy and form wording match, so paste them exactly.

Main line and tracked number

Privacy policy URL with SMS clause

Opt-in wording on each form

The sentence next to the checkbox on your forms. Paste it as-is.

- [ ] A2P campaign framed as customer care and transaction servicing
- [ ] Client submits the registration; we prepare it

SECTION 11 OF 11

Reporting

When the owner's report goes out and who sees it. The stuck-file thresholds decide when a file gets flagged for not moving.

Owner's report day and time

Recipients

Stuck-file thresholds (72h, 5 days, 10 days, 30 days)

How long a file can sit without movement before it is flagged. Keep the defaults unless your process runs differently.

- [ ] Cost per funded loan by source is wanted
- [ ] Dashboard viewers named

THE NEVER-LIST FOR MORTGAGE AND LENDING

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.

- [ ] Any promise, quote or implication of a specific rate, APR, payment or approval that is not a compliant, disclosed, currently available quote.
- [ ] Any triggering term ($0 down, $1,800 a month, 30 years, no closing costs) without the full disclosure block.
- [ ] Guaranteed, pre-approved, you qualify, everyone approved, no credit check.
- [ ] Anything that reads as payment for a referral: referral fee, per lead, per closing, bonus for volume, rebate, commission split.
- [ ] Any document to a partner that ties what they receive to the number or volume of deals they sent.
- [ ] Any payment, gift, free service or expense pick-up for a real estate agent, builder, title company, attorney, insurance agent or financial advisor tied to referrals.
- [ ] An automated denial, adverse action, or anything that reads like a credit decision. Adverse action is a human, LOS-driven process under Reg B.
- [ ] NPI in a marketing text or email: SSN, full DOB, account numbers, credit scores, income.
- [ ] The consumer's current lender's name used in a way that suggests affiliation.
- [ ] Any trigger-lead-sourced contact after March 4, 2026.
- [ ] Discouraging language or any audience selection that proxies for a protected class.

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.