Everborn Productions

CLIENT INTAKE PACKET · FILLABLE

Mortgage Company Intake Packet

Everything we need to build your lead engine, borrower follow-up, realtor partner activity reports and Monday owner's report. Snap Credit Fix, a California credit repair company, runs on a system I built for them.

How to use this packet: fill in what you can, skip what you don't know, and we'll finish the rest together on the intake call. Type directly into the fields (works in Adobe Reader, Preview, Chrome, and most phones) or print and hand-write.

Sections 1-8 tell us who you are and how you work today. Section 9 is the monthly time audit – where your hours actually go. Section 11 shows the three packages and add-ons. Section 12 is a menu of what we can take off your plate; tick everything that sounds useful and write down your top three.

Nothing here commits you to anything. It becomes your one-page Client Brief and a fixed quote within two business days. **Return this packet through a secure upload link, not by email.**

COMPANY

YOUR NAME

DATE

EVERBORN CONTACT

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1. Company Basics

Legal company name (exactly as on your W-9)

DBA / brand name

Main phone

Main email

Website

Office address (city, state, zip)

Company NMLS ID

Branch NMLS ID (if a branch)

Year founded

States licensed in

Primary markets / counties

Number of LOs, processors and LOAs

Loans funded in the last 12 months

Wholesale, retail or both

Company type

- ☐ Mortgage broker
- ☐ Mortgage banker / direct lender
- ☐ Correspondent lender
- ☐ Bank or credit union dept.
- ☐ Net-branch / branch of larger co.
- ☐ Independent LO team

Other:

Loan products you actively market

- ☐ Conventional
- ☐ FHA
- ☐ VA
- ☐ USDA
- ☐ Jumbo
- ☐ Refinance / rate-term
- ☐ Cash-out refi
- ☐ Home equity (HELOC / home-equity loan)
- ☐ DSCR / investor
- ☐ Bank statement / non-QM
- ☐ Reverse (HECM)
- ☐ Construction
- ☐ Commercial
- ☐ Down-payment assistance programs

Other:

Closed loans per month (avg)

Average loan amount

Avg. days lead to funded

12-month volume goal

In one or two sentences, who is your ideal borrower and why do they choose you over the bank down the street?

2. Your Team

Everyone who touches a lead, a customer, or a partner. We use this to set up users, round-robin, calendars, and the Monday report.

NAME	ROLE (LO / LOA / Processor / Closer / Owner / Marketing)	INDIVIDUAL NMLS #	EMAIL	CELL	GETS LEADS?
					☐
					☐
					☐
					☐
					☐
					☐
					☐

Decision maker (signs the agreement)

Day-to-day contact for the build

Who approves outgoing emails / texts?

Who owns compliance review?

Round-robin order (if you use one)

Claim window you would accept (minutes)

How are new leads assigned today?

- ☐ Whoever grabs it first
- ☐ Owner assigns manually
- ☐ Round robin (by rule)
- ☐ By zip / territory
- ☐ By loan type
- ☐ Each LO works only their own leads

Other:

What is the one thing about how the team works that you would NOT want an automated system to change?

3. Brand & Voice

So every text, email, page, and printout sounds and looks like you from day one.

Tagline / one-liner

Brand colors (hex or 'see logo')

Fonts (if known)

Assets you can send us

- ☐ Logo (PNG/SVG, light + dark)
- ☐ Headshots for each LO
- ☐ Existing email signature
- ☐ Brochures / flyers
- ☐ Video / testimonials
- ☐ Existing landing pages

Other:

Google Business Profile link

Review links (Google / Zillow / Experience.com)

Facebook page

Instagram

LinkedIn

YouTube / TikTok

Tone you want in customer communication

- ☐ Warm & plain-spoken
- ☐ Professional / bank-like
- ☐ High-energy sales
- ☐ Educational / advisor
- ☐ Bilingual (specify)

Other:

Required disclosure line(s) for all marketing (e.g. 'NMLS #123456 · Equal Housing Lender · Licensed by the CA DFPI under the CRMLA') – paste it exactly

Anything we must NEVER say or promise in marketing (rate claims, 'guaranteed approval', timelines, etc.)

WEBSITE & SEARCH

Current website URL

Who built it, and who hosts it?

Pages you want (products, locations, team / LO pages, recruiting, contractor page)

Google Business Profile status

Do you rank for your town + "mortgage"?

Any SEO work so far?

4. Current Tools & Access

List what you use now. We will decide together what gets replaced, connected, or left alone. 'Cost' can be a guess.
K = keep · R = replace with the new system · C = connect / integrate · ? = not sure

CATEGORY	TOOL / VENDOR	WHO HOLDS THE LOGIN	MONTHLY COST	K / R / C / ?
Business phone / texting				
Email hosting (Google / Microsoft)				
Domain registrar & DNS				
Website host / builder				
CRM (Jungo, BNTouch, Surefire, Total Expert, Salesforce)				
LOS (Encompass, Calyx Point, LendingPad, BytePro, Arive)				
POS / online application (Floify, Blend, other)				
Pricing engine (Optimal Blue, Polly, other)				
Credit reporting vendor				
E-signature (non-LOS items)				
Calendar / booking				
Social scheduling				
Review management				
Facebook / Instagram ads account				
Google Ads account				
Lead vendors (Zillow, LendingTree, Bankrate)				
Marketing email tool (Mailchimp, Constant Contact, other)				
Rate-alert / retention tool (Homebot, other)				
Spreadsheets / shared drives				
Other				

Roughly what does all of that cost per month, combined? And which tool frustrates the team most?

Do you already pay for an automation / CRM platform account of your own?
☐ No ☐ Yes – we own it ☐ Yes – through another agency ☐ Not sure

5. Where Leads Come From Today

Tick each source and give a rough monthly count. Guesses are fine; we'll replace them with real numbers in week one.

SOURCE	PER MONTH	SOURCE	PER MONTH
☐ Realtor referrals		☐ Past-client referrals	
☐ Website / online app		☐ Facebook / Instagram ads	
☐ Google search / ads		☐ Zillow / Realtor.com	
☐ LendingTree / Bankrate		☐ Purchased lead lists	
☐ Builder / new-construction		☐ Open houses / events	
☐ Organic social / video		☐ Walk-ins / phone-ins	
☐ CPA / financial advisor		☐ Credit repair referrals	
☐ Home-improvement contractor introductions (home equity)		☐ Other:	

Total new leads / month	Lead to application %	Application to funded %	Cost per lead (if known)

Is any trigger-lead budget still in your forecast? (Trigger leads have been banned since March 4, 2026; this must be zero.) ☐ Yes ☐ No

Walk us through the first 5 minutes after a lead arrives right now. Who sees it, how, and how fast does a human respond?

What happens to a lead that doesn't answer the first call? How many attempts, over how many days, and who tracks it?

What happens to a borrower who isn't ready yet, or is 'just shopping rates'? Do they ever hear from you again?

Which of these leak the most business today?

- ☐ Slow first response
- ☐ No follow-up after 2-3 tries
- ☐ Not-yet borrowers go cold
- ☐ Rate shoppers lost
- ☐ Pre-approvals expire unnoticed
- ☐ Realtor never gets updates
- ☐ Past clients never hear from us
- ☐ Leads live in someone's phone

Other:

6. Borrower Pipeline

We will build your pipeline exactly as you run it. Edit the stages below or write your own; tell us what should happen automatically at each one.

Suggested stages: New Lead → Contacted → Application Taken → Pre-Approved → Shopping → Under Contract → Submitted to UW → Conditional Approval → Clear to Close → Funded → Past Client
Side lanes: Not Yet · Rate Watch · Withdrawn · Went Elsewhere

Your actual stages, in order (or 'use suggested')

STAGE	WHAT SHOULD HAPPEN AUTOMATICALLY HERE? (TEXT, EMAIL, TASK, NOTIFY A PARTNER)	WHO IS RESPONSIBLE

Pre-approval letters valid for (days)	Typical pre-approval to contract wait	Who sends status updates today?

Do borrowers get milestone updates (application received, conditional approval, clear to close, funded) automatically today? ☐ Yes ☐ No

Do the buyer's agent and listing agent get the same milestone updates? ☐ Yes ☐ No

Do you want a Not-Yet lane that keeps borrowers who aren't ready warm, introduces them to your credit repair partner, and keeps them in your database until they are ready? ☐ Yes ☐ No

7. Partners

The people who send you business. This is usually the biggest growth lever and the least tracked.

PARTNER TYPE	HOW MANY ACTIVE	TOP 3 NAMES	HOW THEY SEND YOU BUSINESS TODAY	HOW YOU KEEP THEM UPDATED

Partner types

- ☐ Real estate agents / teams
- ☐ Divorce / estate attorneys
- ☐ Property managers / investors
- ☐ Home-improvement contractors (roofing, HVAC, general/remodel, windows & doors, solar, pools / outdoor living)
- ☐ Builders
- ☐ Credit repair companies
- ☐ Employers / HR
- ☐ Financial advisors / CPAs
- ☐ Insurance agents
- ☐ Title / escrow

Other:

How do you track which partner sent which customer, and does the partner ever see that record?

What do you do for partners today (co-branded material, events, updates)? What would you like to do?

Note. RESPA Section 8 prohibits paying for referrals of settlement-service business, so there are no referral fees, gifts or volume bonuses tied to referrals. What IS allowed, and what we build: fast service, milestone updates, a service-level monthly Partner Activity Report with no dollars on it, and co-marketing where each side pays its documented fair share. RESPA Section 8 applies to home-equity loans too, so home-improvement contractors get no per-referral payments, gifts or volume bonuses. What IS allowed with contractors: fast service, status updates with the borrower's consent, and co-marketing at a documented fair share. We review this with your counsel in week one.

Realtor partners you want to add in the next 90 days (#)

Who owns partner relationships?

Any existing MSA or co-marketing arrangement?

Counsel who reviews MSAs

Contractors you already work with (#) and the top 3

8. After the 'Yes' -- Borrower Journey & Retention

Documents you chase most often

- ☐ Pay stubs
- ☐ ID
- ☐ Divorce decree
- ☐ W-2s / 1099s
- ☐ Gift letters
- ☐ Business returns / P&L
- ☐ Tax returns
- ☐ Letters of explanation (LOE)
- ☐ VA COE
- ☐ Bank statements
- ☐ Insurance binder
- ☐ VOE

Other:

How are docs collected today?

Avg. days to get a complete file

Who chases missing docs?

What happens after funding today?

- ☐ Closing gift
- ☐ Added to newsletter
- ☐ Rate-drop / refi watch
- ☐ Review request
- ☐ Annual mortgage review
- ☐ Birthday
- ☐ Thank-you to agent
- ☐ Home anniversary note
- ☐ Nothing consistent

Past clients in your database (#) | **Last time they all heard from you** | **% of business from repeat / referral**

Describe your dream post-close program in one paragraph. What would make a past client call you first next time?

9. Monthly Time Audit

Where the hours actually go. Estimate hours per month per task and who does it. This tells us what to automate first and how to price the monthly.

RECURRING TASK	HOURS / MONTH	WHO DOES IT	PAIN (1-5)	AUTOMATE?
Answering / calling back new leads				☐
Following up on leads who went quiet				☐
Status updates to borrowers				☐
Status updates to realtors / partners				☐
Chasing missing documents				☐
Pre-approval renewals & expiration follow-ups				☐
Rate-watch review of past clients				☐
Birthday, anniversary, holiday touches				☐
Social media posting				☐
Review requests after funding				☐
Partner check-ins, lunches, open-house support				☐
Newsletter / market update emails				☐
Building reports for owner / branch				☐
Data entry between CRM, LOS and spreadsheets				☐
Scheduling appointments back and forth				☐
Answering the same borrower FAQs (docs, timeline)				☐
Cleaning up the database / duplicates				☐
Event marketing (seminars, webinars)				☐
Tracking LO comp				☐
				☐
				☐

What do you dread every month? What always falls through the cracks?

What would you do with 20 extra hours a month?

If this were running perfectly 90 days from now, what would be different? (Be specific: numbers, feelings, what you'd stop doing.)

10. Your Operating Rhythm -- reports and recurring tasks

Tick the reports you actually run or receive, and tell us where each comes from and who pulls it. 'We can make it' is our proposal: FULL = runs by itself, you just receive it · SEMI = we build it, one person approves or does one step · ASSIST = a person still does it, we prep, remind, log and report. In the last column tell us what you want: F / S / K (keep manual).

REPORT / RECURRING TASK	RUN IT?	WHERE IT COMES FROM TODAY	WHO PULLS IT	WE CAN MAKE IT	YOU WANT
Pipeline Report	☐			SEMI	
Lock Report / Lock Expiration	☐			FULL	
Pull-Through Report	☐			FULL	
Production Report	☐			FULL	
Turn-Time Report	☐			FULL	
Conditions Outstanding	☐			FULL	
Stuck-File Report (72 hours / 5 days / 10 days / 30 days)	☐			FULL	
Lead Source Report / Response Time	☐			FULL	
Cost per Funded Loan	☐			FULL	
Expired / Expiring Pre-Approvals	☐			FULL	
Realtor Partner Activity Report (service level)	☐			FULL	
Past-Client / Refi Opportunity Report	☐			SEMI	
LO Scorecard	☐			FULL	
Review / Reputation Report	☐			SEMI	
Marketing Compliance Log	☐			FULL	
NMLS Mortgage Call Report (MCR) inputs	☐			ASSIST	
HMDA LAR readiness	☐			ASSIST	
LO comp statement per LO	☐			FULL	
	☐			--	
	☐			--	

Other things done on a schedule that aren't on the list

Think: lock desk routine, rate sheet distribution, investor scorecards, HMDA/MCR prep, marketing approvals, realtor lunch-and-learns, CE tracking, license renewals, QC file pulls.

TASK	DAILY / WEEKLY / MONTHLY	SYSTEM OR WEBSITE IT LIVES IN	WHO DOES IT	HOURS / MO	F / S / K

Which of these would you hand off tomorrow if you trusted the output? Which ones would you never hand off?

The systems we need to reach, and how you add us as a user (no shared logins), are on the **Systems** page near the end.

11. Starting Points -- the three packages

Three packages, one system. Everything in Launch is in Growth; everything in Growth is in Full Engine. Prices are starting points, confirmed in your written quote.

Launch

$3,500 build, starting point

then **$697 / mo**, platform included

Foundation + every lead answered fast. For a small team whose main leak is response time and follow-up.

Growth

$6,500 build, starting point

then **$1,197 / mo**, platform included

Launch + onboarding, retention, database re-activation, your industry engine, the AI assistant and the full Monday report. The package most businesses land on.

Full Engine

$9,500 build, starting point

then **$1,697 / mo**, platform included

Growth + the referral-partner program with statements, partner outreach, recruiting, every operating-rhythm automation and the monthly automation think-tank.

For a mortgage company: Launch covers speed-to-lead with no rate or approval language, the 5-day drip, booking, review requests on the funded milestone, NMLS and Equal Housing lines on every template, and the funnel report; Growth adds The Loan File Engine – the conditions chase, milestone updates to the borrower and both agents, rate-lock and pre-approval tracking, the 36-month past-client program, the Not-Yet lane – and the full Monday report; Full Engine adds the realtor partner program with QR cards and the service-level Partner Activity Report, realtor outreach, builder / advisor / attorney lanes, the home-improvement contractor home-equity lane (contractor page and intro kit, co-branded home-equity material at fair value, consent-based status updates, contractor outreach), loan officer recruiting and the monthly automation think-tank.

INCLUDED IN GROWTH AND FULL ENGINE — The Loan File Engine

- The Conditions Chase: a live borrower checklist and reminders with a secure upload link until every condition is in
- Three-party milestone broadcast: borrower, buyer's agent and listing agent updated at every milestone
- Rate-lock and expiration watch: staff alerts only, never an automated rate message to a borrower
- Pre-approval letter desk: reissue requests routed to the LO, logged per agent
- The Database Vault: a 36-month past-client cadence, with rate-watch surfaced as a call task for the LO
- Realtor Partner Board: service-level activity per agent, no dollars and no counts tied to dollars
- Co-marketing factory with a proof-of-performance log and documented cost split
- The Compliance Wall: blocked trigger terms and guarantee language, 24-month ad archive
- The Stuck-File Report to the processor and owner
- The Not-Yet Lane: never states a credit decision; introduces your credit repair partner and keeps them in your database

COMPONENT	WHAT IT MEANS FOR YOU	LAUNCH	GROWTH	FULL ENGINE
FOUNDATION				
White-labeled platform workspace	Your CRM, pipelines, calendars, phone, email and automations in one place under your brand; license included in the monthly	●	●	●
Branded email + business phone line	Your domain email and a tracked local number with call routing and recording (with disclosure)	●	●	●
Forms, booking pages and consent capture	Every form, landing page and calendar records written consent to call and text, with a privacy link	●	●	●
Business texting registration (A2P 10DLC)	We prepare the whole submission – EIN, address, privacy policy, sample messages matched to your consent language – and drive it through carrier review. You submit it under your own business identity, as the carriers require	●	●	●
Compliance shell	Timestamped consent records, opt-outs honored on every channel, quiet hours, required disclosure lines and a blocked-phrase list on every template	●	●	●
SALES ENGINE				
Pipeline built to your stages	Your process mapped into stages with side lanes, named the way your team talks	●	●	●
Instant response + round robin	Text + email to every new lead in under 60 seconds; claim-window assignment with automatic reassignment	●	●	●
Missed-call text-back	Every missed call gets a text with a booking link	●	●	●
5-day follow-up drip	Stops the moment they reply or opt out	●	●	●
Long-term nurture	Sized to your buying cycle, with a re-engagement alert when someone comes back	–	●	●
Appointments	Booking calendars per person, confirmations and reminders	●	●	●
Lead-source tagging	Every lead tagged by source at entry, so cost per sale by source is arithmetic	●	●	●
Review requests	At the right moment after the sale, sent to everyone, never filtered by sentiment	●	●	●

COMPONENT	WHAT IT MEANS FOR YOU	LAUNCH	GROWTH	FULL ENGINE
After-hours AI assistant	Answers, qualifies and books when nobody is there, fenced by your industry's never-list	–	●	●
OPERATIONS & RETENTION				
Branded email templates	Your identifiers locked into every template	–	●	●
Client onboarding + invoicing	Welcome, what-happens-next, secure document upload, e-sign, payment links with reminders	–	●	●
Document / signature chase	Reminders with secure upload links until the checklist is complete; live checklist for staff	–	●	●
Database re-activation campaign	Old leads and past customers worked in a ramped, bounce-guarded, auto-unsubscribe campaign	add-on	●	●
Retention program	Anniversaries, check-ins, renewals, and the save flow when someone tries to leave	–	●	●
Industry engine: The Loan File Engine	The Conditions Chase; Three-party milestone broadcast; Rate-lock and expiration watch; Pre-approval letter desk; The Database Vault; Realtor Partner Board; Co-marketing factory with a proof-of-performance log and documented cost split; The Compliance Wall; The Stuck-File Report to the processor and owner; The Not-Yet Lane	–	●	●
Per-rep landing pages + QR cards	Each rep gets a page and card that feed the same pipeline with automatic credit	–	●	●
MONEY DESK				
Owner-routed onboarding	Every new client gets the welcome from their own rep: the rep's name, the rep's email and the rep's own sign-up link, so the file lands in that rep's queue. One message per client, never duplicates. For you: per LO.	–	●	●
LO comp tracking	Reports each LO's pay under the written comp plan your company sets; under Reg Z (12 CFR 1026.36(d)) pay may not be based on a loan's terms, so the tracker never sets or changes pay and your compliance team owns the plan. A monthly statement per LO and a 'needs attention' list	–	–	●
PARTNERS & GROWTH				
Partner referral tracking	Tracked link and printed QR card per partner, so each referral is credited automatically; nothing of value is paid or given for referrals (RESPA Section 8)	add-on	add-on	●
Printable partner materials	Welcome packet, counter cards, one-pagers, version-numbered	–	–	●
Monthly partner activity reports	Service level only: files in process, milestone timelines, days to close; no dollars, no fees, nothing tied to referral volume (RESPA Section 8)	add-on	add-on	●
Partner outreach campaign	A campaign to add partners in your territory, tracked in a partner pipeline, with a no-fee version wherever a fee is illegal	add-on	add-on	●
Partner lanes	Realtor, builder, financial-advisor, attorney and home-improvement contractor (home equity) lanes, each with its own pipeline, cadence and materials	–	add-on	●
Recruiting funnel	Landing page, application, drip, interview booking; who it recruits is set for your industry	–	–	●
COMMAND & CONTROL				
Daily recap	End-of-day summary: leads, response times, appointments	●	●	●
Monday owner's report	Launch: the weekly funnel report. Growth and up: the full owner's report, written as what the business accomplished	o lite	●	●
Live dashboard	One screen for the owner and managers instead of four logins	add-on	●	●
Operating-rhythm automations	The daily / weekly / monthly reports and tasks you mark in section 10	–	–	●
Internal task and alert flows	Unclaimed lead, stalled file, deadline at risk, negative review, manager escalation	–	–	●
Written procedures	Your team's own operations written down	–	–	●
Monthly business report	In addition to the weekly report	add-on	add-on	●
Handoff booklet + training	Every automation documented with screenshots; team trained; Full Engine keeps it current	●	●	●
Priority support	Named contact, weekly 20-minute call, same-day changes	–	–	●
Monthly automation think-tank	A working session every month: we find what your team still does by hand and design and build a custom automation for it	–	–	●

● = included · o lite = lighter version (see description) · add-on = available on that package at the add-on price · – = not included.

Every monthly includes the platform license for your white-labeled workspace ($197 value) – one bill, no separate software vendor. $197 off the monthly if you already pay for the platform we build on. Ad spend and carrier fees billed at cost. Build fee half at signature, half on delivery. Month-to-month after the first 90 days. One-time add-ons bought with the build are 15% less than added later; monthly add-ons are not discounted. Regulated industries get a compliance review in week one at no charge. Your accounts, data and content are yours and export any time, and you keep the right to use the system we built even if you cancel. Our templates and methods stay ours, so no one can resell them. Agreements and invoices come from Everborn Marketing LLC dba Everborn Productions.

Add-ons – attach to any package (fixed fees; starting points, confirmed in your written quote). Tick any you want quoted.

QUOTE IT?	ADD-ON	FEE	NOTE
WEBSITES & SEARCH			
☐	**Online Presence: Starter (bundle)**	**$1,800**	Core site + Local SEO foundation + social profile set-up; $2,200 separately
☐	**Online Presence: Complete (bundle)**	**$3,200**	Full site + Local SEO foundation + brand kit + social profile set-up; $4,000 separately; first month of Local SEO growth free
☐	**Website build: core site**	**$1,200**	Up to 6 pages (home, about, services/products, apply/contact, reviews, compliance/disclosures); lead capture and booking wired to the CRM; mobile, speed and basic on-page SEO
☐	**Website build: full site**	**$2,400**	Up to 15 pages, including per-product/service pages, location pages, team or rep pages, a recruiting page and blog set-up
☐	**Website redesign / migration**	**$900**	Existing site rebuilt or moved, with redirects kept so rankings are protected
☐	**Additional pages (per 5)**	**$350**	Product, location, landing or partner pages
☐	**Local SEO foundation**	**$750**	Google Business Profile optimization, top citations with consistent name/address/phone, on-page SEO and schema, Search Console and analytics set-up, a service-area page plan
☐	**Google Business Profile set-up & optimization**	**$250**	Standalone, if Local SEO foundation isn't bought
☐	**Brand kit**	**$600**	Logo refresh, colors, fonts, email signature, social and document templates
☐	**Social profile set-up**	**$250**	Branded Facebook, Instagram, LinkedIn and YouTube profiles linked to the CRM
☐	**Accessibility review & fixes**	**$450**	WCAG review of the site, with the fixes made
☐	**Google Ads account build**	**$600**	One-time campaign build; ongoing management is the paid ad management line
☐	**Local SEO growth (monthly)**	**$350 / mo**	2 articles a month, weekly Google Business Profile posts, citation and review monitoring, a rank and traffic report
☐	**Website care plan (monthly)**	**$49 / mo**	Hosting, updates, backups, uptime monitoring, compliance-page upkeep and small edits
REVENUE CHANNELS			
☐	**Referral / affiliate program**	**$3,500**	Included in Full Engine
☐	**Partner prospect research (per 100 contacts)**	**$750**	
☐	**LinkedIn prospecting pipeline**	**$1,200**	
☐	**Cold outreach engine (per engine)**	**$3,500**	
☐	**Owned-list reactivation**	**$1,500**	Included in Growth and up
SYSTEMS & DATA			
☐	**Third-party integration**	**$2,500**	Connects the platform you already run on
☐	**Client data migration**	**$1,500**	
☐	**Custom reporting automation**	**$2,500**	
☐	**Executive reporting**	**$1,200**	Monthly business report included in Full Engine
☐	**Performance dashboard**	**$1,800**	Live dashboard included in Growth and up
CREATIVE & COLLATERAL			
☐	**Video ad production**	**$1,500**	
☐	**Document set**	**$2,000**	
☐	**QR capture system**	**$900**	
☐	**Lead magnet**	**$1,200**	Includes the capture page and follow-up
STRATEGY & RISK			
☐	**Growth audit & 12-month plan**	**$2,500**	
☐	**Industry compliance review**	**$1,500**	Week-one review free in regulated industries; this is the full written review
☐	**Messaging & carrier registration**	**$900**	Registration prep is included in every package
☐	**Operations audit**	**$1,500**	
ONGOING -- BILLED MONTHLY			
☐	**Paid ad management**	**$800 / mo**	Ad spend billed direct to the platform

QUOTE IT?	ADD-ON	FEE	NOTE
☐	**Additional campaign management**	**$400 / mo**	
☐	**Partner channel management**	**$600 / mo**	
☐	**Deliverability & compliance monitoring**	**$300 / mo**	
☐	**Content production**	**$700 / mo**	

We never guarantee search rankings or traffic. Bundle prices replace the 15% with-the-build add-on discount; they don't stack.

Which package are you leaning toward?

☐ Launch ☐ Growth ☐ Full Engine ☐ Not sure – recommend one

Anything about the packages or add-ons you want us to explain on the call?

12. What We Can Take Off Your Plate

Tick everything that sounds useful. Write your top three below. This becomes the build order.

`[L] included in Launch and up · [G] Growth and up · [F] Full Engine · [+] add-on, any package`

SPEED TO LEAD

- ☐ Instant text + email to every new lead, under 60 seconds, under your brand, with no rate or approval language `[L]`
- ☐ Round-robin assignment to LOs with 'claim it or it moves on' rules `[L]`
- ☐ Missed-call text-back on the office line and each LO's line `[L]`
- ☐ Online booking calendar for pre-qual calls (per LO, synced to Google / Outlook) `[L]`
- ☐ After-hours AI assistant that answers FAQs and books the call, never quotes a rate or says approved `[G]`
- ☐ Lead-source tagging so you know what every source is worth `[L]`

FOLLOW-UP THAT NEVER FORGETS

- ☐ 5-day 'we tried to reach you' drip that stops the moment they reply `[L]`
- ☐ Rate-shopper follow-up (value, not rates) with a re-engagement alert when they come back `[G]`
- ☐ Not-Yet lane: database nurture plus an introduction to your credit repair partner, so they come back to you when ready `[G]`
- ☐ Pre-approval expiration reminders to the borrower and the agent `[G]`
- ☐ 'Still looking?' check-ins for pre-approved buyers who haven't gone under contract `[G]`
- ☐ Long-term 36-month nurture for anyone not ready now `[G]`

IN-PROCESS EXPERIENCE

- ☐ Milestone texts / emails to the borrower at each stage (received, conditional approval, clear to close, funded) `[G]`
- ☐ Same milestones to the buyer's agent and listing agent, branded to you `[G]`
- ☐ Automated conditions chase with a secure upload link and a live checklist `[G]`
- ☐ Appointment / closing reminders with calendar invites `[L]`
- ☐ 'What to expect this week' education during processing `[G]`
- ☐ Stuck-file alerts to the processor and owner `[G]`

REFERRAL PARTNERS & GROWTH

- ☐ Partner-tagged links + printable QR cards for each realtor, so every referral is credited automatically `[F]`
- ☐ Monthly Partner Activity Report: files in process, milestone timelines, days to close, co-marketing delivered; no dollars `[F]`
- ☐ Realtor outreach campaign (email + LinkedIn) to add new partners in your territory `[F]`
- ☐ Co-branded open-house flyers and one-sheets, logged with the cost split `[G]`
- ☐ First-time-buyer webinar / lunch-and-learn invite funnel (lead magnet + capture page) `[+]`
- ☐ Builder, financial-advisor, attorney and home-improvement contractor partner lanes with their own cadence and materials `[F]`
- ☐ Home-improvement contractor lane: contractor-facing page and intro kit, co-branded 'finance your project with home equity' material at fair value, homeowner intake routed to an LO, consent-based status updates to the contractor, contractor partner pipeline `[F]`
- ☐ Contractor outreach campaign (email + LinkedIn) to roofing, HVAC, remodel and solar companies in your territory `[F]`
- ☐ Loan officer recruiting funnel with NMLS transfer steps `[F]`

PAST CLIENTS & DATABASE

- ☐ Re-activation campaign across your old leads and past clients (ramped, bounce-guarded, auto-unsubscribe) `[G]`
- ☐ Rate-watch flag: past borrowers well above market surface as a call task for the LO `[G]`
- ☐ Annual mortgage review invite on each funding anniversary `[G]`
- ☐ Home-anniversary, birthday and holiday touches on autopilot `[G]`
- ☐ Post-funding review request (Google / Zillow / Experience.com) with follow-up `[L]`

- [ ] Monthly market-update newsletter written and sent for you (content production) [+]

COMMAND & CONTROL

- [ ] Daily recap and weekly funnel report [L]
- [ ] Monday owner's report: leads by source, response times, pipeline by stage, partner activity, what got built [G]
- [ ] Live dashboard for the branch / owner [G]
- [ ] Compliance shell: NMLS + Equal Housing lines on every template, opt-out handling, consent capture on every form [L]
- [ ] Handoff booklet documenting every automation so nothing depends on memory [L]
- [ ] Monthly automation think-tank: a working session with us to design and build a custom automation for whatever your team is still doing by hand [F]

MONEY DESK

- [ ] Owner-routed onboarding: every new borrower gets the welcome from their own LO – the LO's name, email and own sign-up link – so the file lands in that LO's queue; one message per borrower, never duplicates [G]
- [ ] Secure two-step sign-up: Documents (pay stubs, bank statements, IDs) never by email; the welcome sends them to a secure form that files it straight into your system of record [G]
- [ ] LO comp tracking: reports each LO's pay under the written plan your company sets; pay is never tied to a loan's terms (Reg Z), and the tracker never sets or changes pay. Monthly statement per LO and a 'needs attention' list [F]

Top pick #1 | **Top pick #2** | **Top pick #3**

Anything you want that isn't on the list

13. Compliance & Consent

Mortgage marketing is regulated. We build the guardrails in; you tell us your rules.

Which apply to you?

- [ ] NMLS / state license disclosures
- [ ] TCPA texting consent required
- [ ] Do-Not-Call scrub
- [ ] ECOA / Fair Lending review of copy
- [ ] RESPA Section 8 (no referral fees)
- [ ] UDAAP-safe rate / APR language
- [ ] Reg Z trigger terms + Reg N 24-month ad archive
- [ ] State-specific ad rules
- [ ] Fair Housing / Equal Housing Lender
- [ ] Recorded-call disclosure
- [ ] Email CAN-SPAM opt-out
- [ ] GLBA privacy (no NPI in marketing)
- [ ] Home-equity advertising rules (Reg Z trigger terms)
- [ ] No funding-timeline promises in contractor or homeowner material

Other:

Is the team currently allowed to text borrowers? ☐ Yes ☐ No

Do your forms capture written consent to text and call? ☐ Yes ☐ No

Does anyone review marketing before it goes out? ☐ Yes ☐ No

Does adverse action stay in the LOS, handled by a person? ☐ Yes ☐ No

Compliance officer / attorney (name, email) | **Turnaround needed for approvals**

Any past complaints, audits, or rules from a regulator we should design around?

14. Reporting & Communication

Who receives the Monday report? (names, emails) | **Best day / time**

Numbers you care about most

- ☐ Leads by source
- ☐ Speed to first response
- ☐ Contact rate
- ☐ Apps started
- ☐ Pre-approvals issued
- ☐ Loans funded / volume
- ☐ Pull-through rate
- ☐ Partner referrals
- ☐ Past-client repeat / referral
- ☐ Cost per funded loan
- ☐ Ad spend & results
- ☐ Pipeline value by stage

Other:

How do you want us to communicate during the build?

- ☐ Text
- ☐ Email
- ☐ Weekly call
- ☐ Shared doc
- ☐ Slack / Teams

15. Access Checklist

We will request these on the intake call. Tick what you can provide now. Nothing is changed without your sign-off.

- ☐ Domain registrar / DNS login (or add us as a user)
- ☐ Website host / builder login
- ☐ Google Business Profile manager access
- ☐ Existing CRM export (contacts, notes, tags)
- ☐ Old lead lists / spreadsheets (CSV)
- ☐ Company EIN, legal address, and website with privacy policy (required for business texting registration)
- ☐ Review-site links
- ☐ Google Workspace / Microsoft 365 admin (for branded email + calendars)
- ☐ Facebook Business Manager + page admin (for lead ads)
- ☐ Google Ads / other ad accounts
- ☐ LOS / POS contact export or API access
- ☐ Logo files and headshots
- ☐ Existing phone number(s) to port or forward
- ☐ Any current email templates you like

Anything else we should know before we start?

Systems, and how we get access

Where a system lets you add us as a user with our own login, you do that. Where it connects by sign-in, you sign in and click Allow. Anything else we set up live with you on a screen share.

SYSTEM	WEB ADDRESS	HOW WE GET ACCESS	WHO ON YOUR SIDE ADDS US
Domain registrar & DNS		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Google Workspace admin	admin.google.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Microsoft 365 admin (if not Google)	admin.microsoft.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Website host / builder		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Current CRM		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
LOS (contact export only)		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
POS / online application		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Pricing engine		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Business phone / texting provider		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Facebook Business Manager	business.facebook.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Google Business Profile	business.google.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Google Ads	ads.google.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Zillow (lender profile / reviews)	zillow.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Experience.com (reviews)	experience.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
LendingTree / Bankrate lead portal		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Marketing email tool		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Rate-alert / retention tool		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Existing CRM / automation platform (if you already have		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	

We never ask for or store passwords.
You stay in control and can remove our access at any time.

Sign-off

Nothing here commits you to anything. Within two business days you get a one-page Client Brief and a fixed quote.

Client – name	Client title	Client signature	Client date

Your agreement and invoices come from Everborn Marketing LLC dba Everborn Productions.

Everborn – name	Everborn title	Everborn signature	Everborn date
Chris Magee			