PACKAGES AT A GLANCE

Three packages.
One system.

Mortgage & Lending

Same three prices in every industry. This sheet shows what lands in each package when the business is mortgage and lending.

A system that chases conditions, broadcasts milestones to the borrower and both agents, and works your database for 36 months without an LOA remembering to.

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THE THREE PACKAGES

Pick the one that matches the leak.

Two of every three borrowers who refinanced in Q1 2026 did it with someone else. Meanwhile the shop spends about $10,900 to manufacture a loan and keeps $973 of it, and the LOA's day goes to texting new leads, chasing paystubs, updating agents and asking for reviews. The trigger-lead spigot closed on March 4, 2026, so the partner and database channels are now the whole game.

Launch

$3,500 build

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

A small team whose main leak is response time and follow-up.

- Tracked number, domain and email
- Pipelines in your team's language
- Lead capture with written consent
- Reply in under 60 seconds
- Round-robin with a claim window
- Missed-call text-back
- Booking calendars
- 5-day follow-up drip

Growth

$6,500 build

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

Everything in Launch, plus onboarding, retention, re-activation and your industry engine.

- Everything in Launch
- Branded email templates
- Client onboarding
- Invoicing and payment links
- Document and signature chase
- The Loan File Engine

Full Engine

$9,500 build

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

Everything in Growth, plus partners, full operations and the monthly think-tank.

- Everything in Growth
- Referral partner program
- Printable partner materials
- Monthly partner statements
- Partner outreach campaign
- Monthly automation think-tank

The Loan File Engine

A front end that answers every inquiry in under a minute with no rate or approval language, a Loan File Engine that runs the conditions chase and the three-party milestone broadcast, and a 36-month database program aimed at the retention problem. The LOS stays the system of record; we never touch the 1003, the CD or the credit file.

FEATURE MATRIX · PART ONE

WHAT IS INCLUDED	LAUNCH	GROWTH	FULL ENGINE
FOUNDATION AND SPEED TO LEAD			
Tracked number, domain and email	●	●	●
Pipelines in your team's language	●	●	●
Lead capture with written consent	●	●	●
Reply in under 60 seconds	●	●	●
Round-robin with a claim window	●	●	●
Missed-call text-back	●	●	●
Booking calendars	●	●	●
5-day follow-up drip	●	●	●
Lead-source tagging	●	●	●
Review requests	●	●	●
Business texting registration	●	●	●
Compliance shell	●	●	●
Daily recap and weekly funnel report	●	●	●
Handoff booklet and training	●	●	●
OPERATIONS AND RETENTION			
Branded email templates	—	●	●
Client onboarding	—	●	●
Invoicing and payment links	—	●	●
Document and signature chase	—	●	●
Long-term nurture	—	●	●
Owned-list re-activation	—	●	●
Retention program	—	●	●
Per-rep pages and QR cards	—	●	●
After-hours AI assistant	—	●	●
Full weekly owner's report	—	●	●
Live dashboard and command center	—	●	●

● included — not in this package

FEATURE MATRIX · PART TWO

WHAT IS INCLUDED	LAUNCH	GROWTH	FULL ENGINE
THE LOAN FILE ENGINE (YOUR INDUSTRY ENGINE)			
The Conditions Chase	—	●	●
The Three-Party Milestone Broadcast	—	●	●
The Rate-Lock and Expiration Watch	—	●	●
Pre-Approval Letter Desk	—	●	●
The Database Vault	—	●	●
The Realtor Partner Board	—	●	●
The Co-Marketing Factory with Proof of Performance	—	●	●
The Compliance Wall	—	●	●
The Stuck-File Report	—	●	●
The Not-Yet Lane	—	●	●
PARTNERS, RHYTHM AND THE THINK-TANK			
Referral partner program	—	—	●
Printable partner materials	—	—	●
Monthly partner statements	—	—	●
Partner outreach campaign	—	—	●
Partner lanes	—	—	●
Operating-rhythm automations	—	—	●
Internal task and alert flows	—	—	●
Written procedures	—	—	●
Priority support	—	—	●
Monthly business report	—	—	●
Handoff booklet, kept current	—	—	●
Monthly automation think-tank	—	—	●

● included — not in this package

TERMS

The fine print, in plain words.

- **Same three packages, same prices, every industry.** What changes is what goes inside them for mortgage and lending.
- Each monthly fee includes a **$197 platform licence** for your white-labeled workspace. One bill, no separate software vendor. If you already own your own HighLevel account, take $197 off the monthly and we build in yours.
- **Ad spend and carrier messaging fees are billed at cost.** We don't mark them up.
- The **build fee is half at signature, half on delivery.**
- **Month to month after the first 90 days.** No long contract.
- **Add-ons bought with the build are 15% less** than the same add-on later.
- **Regulated industries get a compliance review in week one at no charge.** Every template goes to your compliance officer or counsel before it goes live. We build the system and the evidence file; we do not give legal advice.
- **You own everything** — accounts, data, scripts and documents. Your contacts, pipelines, templates and documents export at any time, and the domain and sheets are registered in your name.

What we ask of you

About two hours for intake in week one, a thirty-minute review each week during the build, and one hour at handoff. After that, the only thing the system needs from your team is that they answer the leads it hands them. That one is not optional, and it is the single biggest difference between clients who get results and clients who don't.

Proof

Snap Credit Fix, a California credit repair company in one of the most regulated categories there is, runs on a system I built for them: leads answered in under a minute and assigned round-robin, a 52-week nurture, a re-activation campaign across roughly 40,000 past leads, a dealer referral program with printed QR counter cards and automated monthly statements, and a Monday report the president reads first. If it passes there, it passes in yours.