BUSINESS AUTOMATION FOR MORTGAGE AND LENDING

Every file moves. Every agent knows where it is. Every past borrower hears from you before the next refi.

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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.

THE LOAN FILE ENGINE · INCLUDED IN GROWTH

The Conditions Chase

Every borrower gets a live mobile checklist of what underwriting still needs: paystubs, two months of bank statements, W-2s, VOE, letter of explanation, insurance binder.

The Three-Party Milestone Broadcast

Application received, disclosures signed, submitted to underwriting, appraisal ordered, appraisal in, conditional approval, clear to close, docs out, funded, recorded.

The Rate-Lock and Expiration Watch

A days-to-expiration board with staff alerts at 15, 10, 5 and 2 days, plus float-down and extension task prompts. Alerts go to staff only. No automated rate message ever goes to a borrower.

Pre-Approval Letter Desk

An agent or borrower requests a reissue at a new purchase price through a form. It routes to the LO, logs the request, and delivers the signed letter with full disclosures.

The Database Vault

Every funded borrower enters a 36-month monthly cadence: loan anniversary, birthday, home-value check-in, tax-document season, annual mortgage review.

A NEW LEAD'S FIRST HOUR, AFTER THE BUILD

0:00	Lead submits a form, landing page or QR card — lands in the pipeline, tagged by source
0:01	Instant text and email go out under your brand
0:01	Round-robin assigns the next person and notifies them
0:15	Nobody called? Reminder fires, and the owner sees it Monday
Day 1–5	No reply? A short follow-up drip runs, then stops
Sold	Onboarding kicks off on its own, and The Loan File Engine takes over

Also in the engine

The Realtor Partner Board; The Co-Marketing Factory with Proof of Performance; The Compliance Wall; The Stuck-File Report; The Not-Yet Lane.

PACKAGES · ONE-TIME BUILD, THEN FLAT MONTHLY WITH THE PLATFORM INCLUDED, MONTH TO MONTH AFTER 90 DAYS

Launch

$3,500

then $697 / month

- 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

Growth

$6,500

then $1,197 / month

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

Full Engine

$9,500

then $1,697 / month

- **Everything in Growth, plus**
- Referral partner program
- Printable partner materials
- Monthly partner statements
- Partner outreach campaign
- Monthly think-tank: custom automations for your team's daily tasks

A Loan Officer Assistant runs about $61,000 a year loaded

You are spending about $10,900 to manufacture a loan and keeping $973 of it. **Built and running today:** Snap Credit Fix, a California credit repair company, runs on a system I built for them — leads answered in under a minute, a 52-week nurture, a re-activation campaign across roughly 40,000 past leads, a dealer referral program with QR counter cards and automated monthly statements, and a Monday report the president reads first.

NEXT STEP

Book a 20-minute build call.

Email everbornproductions@gmail.com or call (916) 541-3415 with your business name and website. You'll get a one-page brief and a fixed quote within two business days.

Same three prices in every industry, quoted for one location and up to five reps; larger teams are scoped in the brief. Platform included; ad spend and carrier fees billed at cost. Own your platform account already? Take $197 off each monthly. Regulated industries get a compliance review in week one at no charge. Independent builder and platform licensee. Results vary.