Everborn Productions

WHAT YOU ARE GETTING

The build, itemized.

Mortgage & Lending

Not a feature brochure. Every line below is something that exists and works when the four weeks are done, and that you can open in your own account and see.

Each package is cumulative. Growth includes all of Launch. Full Engine includes all of Growth. The prices are the same in every industry; what is inside them is built for mortgage and lending.

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Launch

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

BUILD FEE	MONTHLY
$3,500	$697
one time	includes the platform

DELIVERED

- **Tracked number, domain and email.** A tracked local number, your domain and professional email on your own identity, with call routing and recording.
- **Pipelines in your team's language.** CRM pipelines and stages named the way your team actually talks.
- **Lead capture with written consent.** A lead-capture page and forms that record written consent to call and text, with a privacy link, on every entry point.
- **Reply in under 60 seconds.** A reply to every new inquiry in under 60 seconds, by text and email, that stops the moment they answer.
- **Round-robin with a claim window.** Round-robin assignment with a claim window and automatic reassignment, so no lead sits with someone who is off.
- **Missed-call text-back.** Missed-call text-back with a booking link.
- **Booking calendars.** Booking calendars per person with confirmation and reminder sequences.
- **5-day follow-up drip.** A 5-day follow-up drip that stops instantly on any reply or opt-out.
- **Lead-source tagging.** Lead-source tagging at entry on every channel, so cost per sale by source is measurable from day one.
- **Review requests.** A review request at the right moment after the sale or visit, sent to everyone, never filtered by sentiment.
- **Business texting registration.** A2P 10DLC brand and campaign registration prepared with sample messages that match your consent language.
- **Compliance shell.** Consent records with timestamps, STOP and any-reasonable-means opt-outs honored across every channel and workflow, quiet hours, the required footers and identifiers, and a blocked-phrase list applied to every template.
- **Daily recap and weekly funnel report.** Daily recap and a weekly funnel report to the owner.
- **Handoff booklet and training.** A handoff booklet with screenshots of every system, and team training.

BUILT FOR MORTGAGE AND LENDING

PIPELINE STAGES

New Lead → Contacted → Application Taken → Pre-Approved → Shopping → Under Contract → Submitted to UW → Conditional Approval → Clear to Close → Funded → Past Client

- NMLS ID for the MLO and the company, plus the Equal Housing Lender mark, built into every template, signature and page footer.
- **Pipeline stages in loan language:** New Lead, Contacted, Application Taken, Pre-Approved, Shopping, Under Contract, Submitted to UW, Conditional Approval, Clear to Close, Funded, Past Client.
- Pre-approval request landing page with compliant consent language and no triggering terms anywhere on it.
- **The instant reply and the 5-day drip carry a hard rule:** no rate, payment or approval language in any automated message.
- **A2P 10DLC is real work here.** Carriers treat loan marketing as restricted content, so campaigns are framed as customer care and transaction servicing for people who applied, with clean opt-in evidence. Surface this before the sale, not after.
- Compliance shell adds the Reg Z trigger-term and guarantee blocklist, universal STOP honored across every workflow within 10 business days, CAN-SPAM footer, state license disclosures, and 24-month archiving of every message variant for Reg N.
- Review request fires on the funded milestone to Google, Zillow and Experience.com.

Growth

Everything in Launch, plus onboarding, retention, database re-activation, the full Monday report and your industry engine. The package most businesses land on.

BUILD FEE	MONTHLY
$6,500	$1,197
one time	includes the platform

DELIVERED — EVERYTHING IN LAUNCH, PLUS

- **Branded email templates.** Branded email templates with your identifiers locked in.
- **Client onboarding.** Client onboarding on “Sold”: welcome, what-happens-next, document request with secure upload links, e-sign, payment link. Never asks for sensitive data by email reply.
- **Invoicing and payment links.** Invoicing and payment links with reminders until paid.
- **Document and signature chase.** Document and signature chase with a live staff checklist showing who owes what and how long it has been outstanding.
- **Long-term nurture.** Long-term nurture sized to your buying cycle, kept separate from the 5-day drip, with a re-engagement detector that moves anyone who responds back to the front of the pipeline with an alert.
- **Owned-list re-activation.** Owned-list re-activation: a ramped, bounce-guarded campaign against every old lead and past customer you already paid for.
- **Retention program.** A retention program for existing customers: anniversaries, check-ins, renewals, and the save flow when someone tries to leave.
- **Per-rep pages and QR cards.** Per-rep landing pages and QR cards, each feeding the same pipeline with attribution to the rep.
- **After-hours AI assistant.** An after-hours AI assistant that answers, qualifies and books, fenced by your industry’s never-list.
- **Full weekly owner’s report.** The full weekly owner’s report, written as what the business accomplished, never a task log.
- **Live dashboard and command center.** A live dashboard and an owner’s command center: one screen instead of four logins, showing this week’s recurring tasks with tick-off, a green, amber or red light on every system, the documents and logins in one place, and a fix-it runbook for when something breaks.
- **Client onboarding is borrower onboarding:** welcome, document collection and e-sign for non-LOS items only. Disclosures, the 1003 and the CD stay in the LOS.
- Invoicing and payment links cover appraisal deposits and credit report fees.
- Long-term nurture runs 36 months with an 18-month checkpoint (the Database Vault).
- The after-hours AI assistant never quotes a rate, never states a payment, never says approved, and hands anything substantive to a licensed MLO.

YOUR INDUSTRY ENGINE · INCLUDED IN GROWTH

The Loan File Engine

Pipeline, partners and past clients, built inside RESPA

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. Reminders at 24 hours, 72 hours and 5 days with a secure upload link. The processor's board sorts every file by oldest outstanding condition, and the chase stops the moment the document lands.

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. Each one fires a tailored update to the borrower, the buyer's agent and the listing agent. Agents get the update before they call to ask. This is what earns the next deal without anyone paying for it.

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. Every letter is tracked per agent, so the LO can see whose buyers are actually writing offers.

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. An internal rate-watch flag surfaces past borrowers whose note rate now sits well above market as a call task for the LO, never as an automated rate blast.

The Realtor Partner Board

A per-agent page showing files in process, average days to close for their buyers, pre-approvals issued for their pipeline, and co-marketing delivered. It generates the monthly Partner Activity Report, a service-level document only. No referral counts with dollars attached, no volume tiers, no per-deal anything.

The Co-Marketing Factory with Proof of Performance

Templated co-branded open-house flyers, what-your-buyer-can-afford one-sheets, market updates and joint social posts, each carrying both parties' branding, both NMLS numbers and the required disclosures. Every piece is logged with date, distribution, actual cost and the documented cost split, so the proof file exists before anyone asks for it.

The Compliance Wall

A blocked-phrase engine that refuses to send any automated message containing a Reg Z triggering term without the disclosure block, or the words guaranteed, approved, you qualify, no credit check, or a bare rate. Plus universal opt-out enforcement, the 24-month advertisement archive and a quarterly compliance export.

The Stuck-File Report

A daily flag on any file with no activity in 72 hours, any condition outstanding past 5 days, any appraisal not received within 10 days of order, and any file past 30 days from application. Goes to the processor and the owner.

The Not-Yet Lane

When the LO has had the conversation and a borrower is not ready, the LO tags the record Not Yet. The system never states or implies a credit decision. The borrower gets an introduction to the shop's credit repair partner and joins the database cadence, so they come back to this LO when they are ready.

Full Engine

Everything in Growth, plus the referral-partner program, full operations, and a monthly think-tank that keeps finding the next thing to take off your team's plate.

BUILD FEE
$9,500
one time

MONTHLY
$1,697
includes the platform

DELIVERED — EVERYTHING IN GROWTH, PLUS

- **Referral partner program.** A referral partner program with a tracked link and printed QR card per partner and automatic attribution written at lead creation.
- **Printable partner materials.** Printable partner materials: welcome packet, counter cards, one-pagers, version-numbered.
- **Monthly partner statements.** Automated monthly partner statements, with contents set by what the law allows in your industry. Where a threshold decides what appears on a statement, the system records the decision and never the figure behind it, so the sheet stays safe to share with staff.
- **Partner outreach campaign.** A partner outreach campaign to build the bench, with a no-fee copy variant wherever a fee is illegal.
- **Partner lanes.** Partner lanes: a separate pipeline and cadence per partner type.
- **Operating-rhythm automations.** Every operating-rhythm automation from the intake: huddle prep, daily lists, weekly reviews, monthly reports.
- **Internal task and alert flows.** Internal task and alert flows: unclaimed lead, stalled file, deadline at risk, negative review, manager escalation.
- **Written procedures.** Written procedures for the team's own operations.
- **Priority support.** Priority support: a named contact, a weekly twenty-minute call, same-day changes.
- **Monthly business report.** Monthly business report in addition to the weekly.
- **Handoff booklet, kept current.** The handoff booklet, kept current as the system changes.
- **Monthly automation think-tank.** A standing session every month where we sit down with you and your team, find the daily tasks eating their time, and design and build custom automations for them.

THE PART NOBODY ELSE SELLS

Monthly automation think-tank

A standing session every month where we sit down with you and your team, find the daily tasks that are eating their time, and design and build custom automations for them. Every build is documented and added to your handoff booklet. It is the reason Full Engine clients stay for years: the system keeps getting better instead of slowly going stale.

FULL ENGINE, BUILT FOR MORTGAGE AND LENDING

Partners, lanes and rhythm in your business.

- Partner attribution is for the client's internal pipeline management and marketing ROI. It never becomes a compensation document delivered to the partner.
- Monthly partner statements are replaced by the monthly Partner Activity Report: files in process for that agent's buyers, milestone timelines, days to close, pre-approvals issued, co-marketing delivered. Service level only, no money, no counts tied to dollars.
- **Partner lanes by type:** the agent lane, the builder lane, the financial-advisor lane, the attorney lane, each with its own cadence and materials. Every one of these is a RESPA-covered relationship.
- Every one of those lanes is a separate, fee-free program rather than a switch on a paid one: its own workbook, sign-up form and outreach sheet, with no tier, rate, owed, W-9, payment or 1099 column anywhere in them and an instruction on the sheet that none may be added. A column that does not exist cannot be filled in by a helpful staff member, and the copy says plainly in both directions that nobody is paying anybody, because the agent asking is the one thinking about RESPA Section 8.
- **An MSA and co-marketing documentation system:** agreement templates the client's counsel finalizes, plus the automated proof-of-performance log, fair-market-value worksheets, invoice tracking and cost-split records. We build the evidence file; the lawyer writes the agreement.
- **Recruiting funnel:** yes, for loan officers. Landing page, pipeline, nurture, interview scheduling, and an onboarding checklist with NMLS transfer and state licensing steps. The highest-value use of this tier for a growing brokerage.
- **Operating-rhythm automations:** Monday pipeline huddle prep, daily stuck-file report, weekly partner-activity digest, monthly database-health report, quarterly compliance export.
- **Internal alerts:** rate-lock expirations, CD timing, appraisal aging, condition aging, license renewal and CE deadlines per MLO.

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.