



EZ GROWTH OS

Loan Officer Participation SOP

Social Media Setup & Connection Requirements

Purpose

EZ Growth OS is designed to create, personalize, publish and follow up on social-media marketing for participating EZ Fundings Loan Officers. The goal is simple:

EZ does the marketing work. The Loan Officer handles the conversations.

To participate, each Loan Officer only needs to make sure their social profiles are properly set up, provide accurate profile information and connect approved social accounts to EZ Flow / GHL.

Quick Overview

- Set up the required social profiles
- Make sure each profile looks professional
- Confirm you can log in to each account
- Provide your correct LO profile information
- Connect approved accounts to EZ Flow / GHL
- Respond to opportunities once the system is live

1. Required Social Media Accounts

Required at minimum:

- Facebook Business Page
- Instagram Professional or Business Account
- LinkedIn Profile
- TikTok Account

Strongly recommended: YouTube Channel. Additional platforms may be added later, including Pinterest, X, Reddit and NextDoor. Personal Facebook profiles should not be used in place of a Facebook Business Page.

2. Make Sure Each Profile Is Professional

Before connecting your accounts, review each profile.

- Your name clients know you by
- A current professional headshot
- EZ Fundings affiliation where appropriate
- Required NMLS / licensing information
- Current phone number
- Current business email
- Approved website or landing page
- Primary location / market

3. Confirm You Have Login Access

Before scheduling your connection, make sure you can successfully log in to each account.

- Facebook Business Page
- Instagram
- LinkedIn
- TikTok
- YouTube (if applicable)

Do not wait until the connection meeting to locate passwords or recover accounts.

4. Connect Instagram and Facebook Properly

Your Instagram Professional / Business account should be connected to your Facebook Business Page through Meta.

- Facebook Business Page is active
- Instagram is a Professional or Business account
- Instagram is connected to the correct Facebook Page
- You have administrator or appropriate management access

5. Provide Your LO Profile Information to EZ Growth OS

EZ will maintain an LO profile record used to personalize content. Please provide or confirm the following information:

■ Full Name	■ Preferred Display Name
■ NMLS #	■ Phone
■ Email	■ Website
■ Primary Market / City	■ State(s) Licensed
■ Professional Headshot	■ Facebook Business Page
■ Instagram	■ LinkedIn

■ TikTok

■ YouTube

Make sure this information is accurate. Growth OS will use it to create LO-specific marketing versions.

6. Connect Your Accounts to EZ Flow / GHL

Once your accounts are ready, the EZ team will assist with connecting supported social profiles to EZ Flow / GHL. During the connection process, you may be asked to authorize permissions that allow EZ Growth OS to:

- Publish approved content
- Manage scheduled posts
- Receive permitted social interactions
- Route responses into EZ Flow
- Trigger follow-up campaigns
- Track lead activity

Important: Never provide your social-media password by email, text message or spreadsheet unless specifically directed through an approved secure process. Whenever possible, account access should be granted using the platform's normal authorization process.

7. Understand What EZ Growth OS Will Do

Once connected, EZ Growth OS will handle most of the marketing workload.

- Monthly campaign / topic planning
- Blog and content creation
- Lead magnet creation
- Static social graphics
- Carousels
- Short-form video / Reels
- Captions and platform-specific versions
- LO personalization
- Scheduling and posting
- Campaign keywords
- Lead capture
- EZ Flow enrollment
- Email / SMS follow-up
- LO notifications and tasks
- Performance tracking

Example: During the Self-Employed campaign, multiple pieces of content may discuss 1099 income, bank statements, P&L; income, tax-return challenges, second-look options and other self-employed mortgage topics. For this campaign, the social CTA may consistently be: **COMMENT “1099”**. The consumer can then be routed into the appropriate EZ Flow follow-up process.

8. Understand What the Loan Officer Must Do

EZ Growth OS does not replace the Loan Officer. Your primary responsibilities are:

- Keep your profiles active and connected
- Respond promptly to LO alerts
- Make the phone call
- Continue the conversation once the consumer engages directly with you
- Keep your information current

9. Respond Quickly to Interested Consumers

When Growth OS generates an LO notification or task, treat it as a live opportunity. Respond as close to immediately as practical. The automation is designed to create the conversation, not replace it.

10. Optional Paid Social Participation

The core Growth OS social program is designed around organic distribution. From time to time, EZ may recommend optionally boosting successful Meta content. Participation in paid boosting is voluntary. A typical optional budget may be \$25–\$50 per month.

11. Participation Is Voluntary — But Strongly Recommended

Growth OS can only distribute content through accounts that are connected. If you choose not to participate, EZ cannot post Growth OS content to those accounts, your social reach will be lower and your account will generate fewer opportunities from the program.

You are not being asked to become a marketer. You are being asked to plug into the marketing system EZ is building for you.

Loan Officer Participation Checklist

■ I have a Facebook Business Page	■ I have an Instagram Professional / Business Account
■ I have a current LinkedIn profile	■ I have a TikTok account
■ I have or am creating a YouTube channel	■ My profiles use professional photos and information
■ My NMLS / licensing information is correct	■ My phone and email are correct
■ I know my account login information	■ My Facebook and Instagram accounts are properly connected
■ I have provided EZ with my LO profile information	■ I have connected approved social accounts to EZ Flow / GHL
■ I understand EZ will create and distribute the content	■ I understand I am responsible for responding to interested consumers
■ I will notify EZ if my information or accounts change	
YOUR JOB Set up your profiles. Connect them to EZ Flow. Keep your information current. Answer the opportunities.	EZ GROWTH OS' JOB Create. Personalize. Post. Capture. Follow up. Send you the conversation.

Connect once. Benefit repeatedly.