

# FHA REVIEW

## AUTOMATED MARKETING CAMPAIGN

EZ Flow 3.0



### CAMPAIGN GOAL

Move FHA borrowers into a focused review of their current FHA loan, mortgage insurance, payment, equity position, and possible FHA-to-Conventional options.



### PRIMARY CTA



[Review My FHA Options]



### SECONDARY CTAS



[Check FHA Mortgage Insurance]



[Compare FHA vs Conventional]



[Check My Payment Options]



[Run My FHA Numbers]



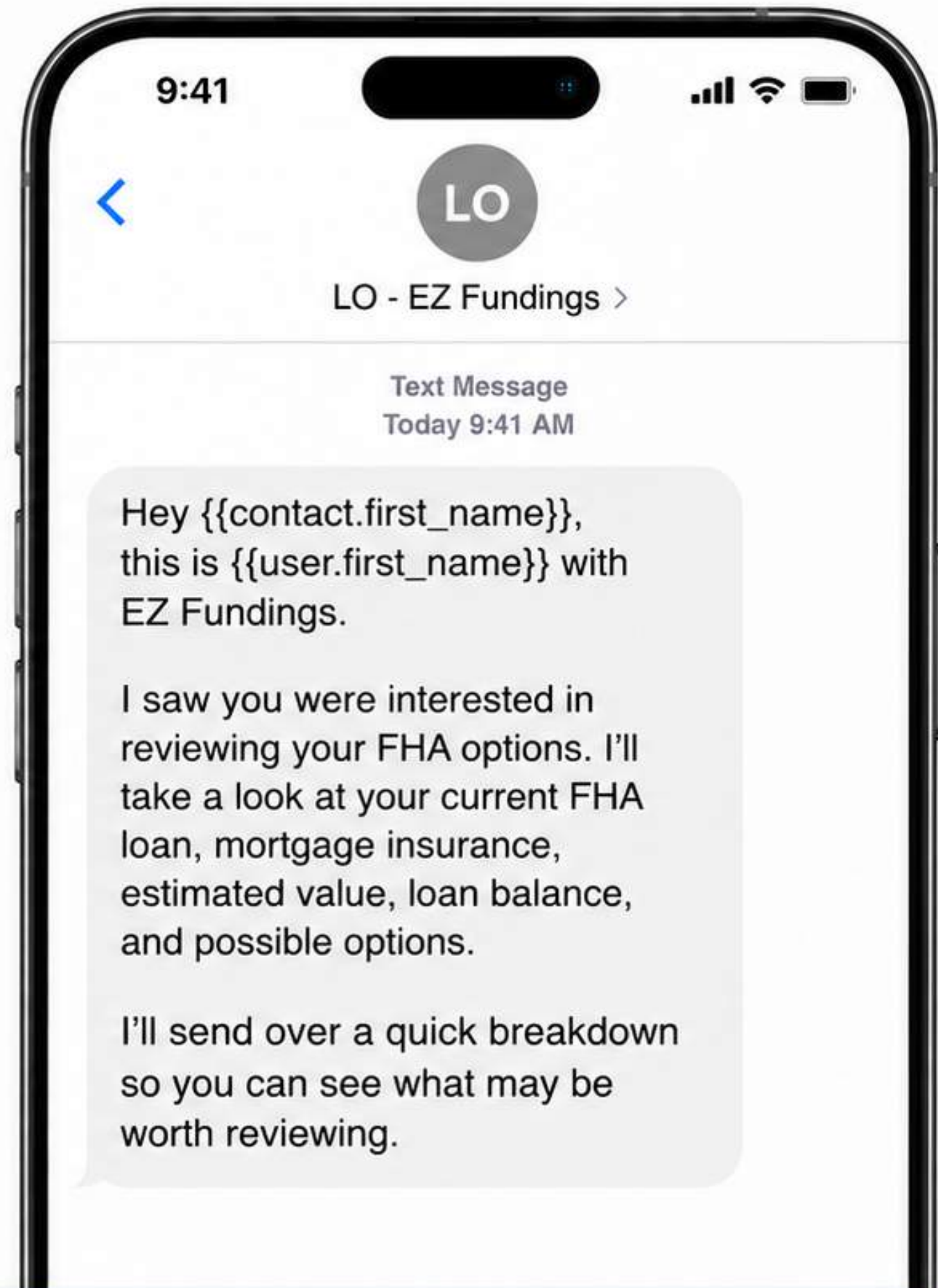


DAY 0 —

LO MANUAL TEXT



**SMS**



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CLIENT FOCUSED



BETTER OUTCOMES

**DAY 1****EMAIL #1**

# INTRO + VIDEO

**Subject:** Your FHA loan may be worth reviewing**EMAIL PREVIEW (DESKTOP)**

**Subject:** Your FHA loan may be worth reviewing  
**From:** {{user.name}} - EZ Fundings <{{user.email}}>  
**To:** {{contact.email}}



Hi {{contact.first\_name}},

Since you showed interest in reviewing your FHA options, I wanted to send you a simple breakdown.

If you still have an FHA loan, a lot may have changed since you closed.

Your home value may have increased.

Your loan balance may be lower.

Your equity may have grown.

Your credit or income may look different.

And your loan options may have changed.

An **FHA Loan Review** helps us look at your current loan and determine whether it still fits your goals today.

We can review:

- FHA mortgage insurance
- Current payment
- Estimated home value
- Estimated loan balance
- Equity position
- FHA vs Conventional options
- Whether a new structure may improve your payment

I put together a quick video that explains how the FHA review works:



I'll review your FHA options and put together a clear plan based on your current loan.

You can also choose where you want to start:

- ➔ [\[Check FHA Mortgage Insurance\]](#)
- ➔ [\[Compare FHA vs Conventional\]](#)
- ➔ [\[Run My FHA Numbers\]](#)

**LANDING PAGE PREVIEW**

https://ezfundings.com/help-someone-buy-smarter



## Still in an FHA Loan?

[Contact Me Now](#)

**Secure & Private**  
Your information  
is protected.



**Quick & Easy**  
Takes less than  
2 minutes.



**No Obligation**  
Just honest  
answers.



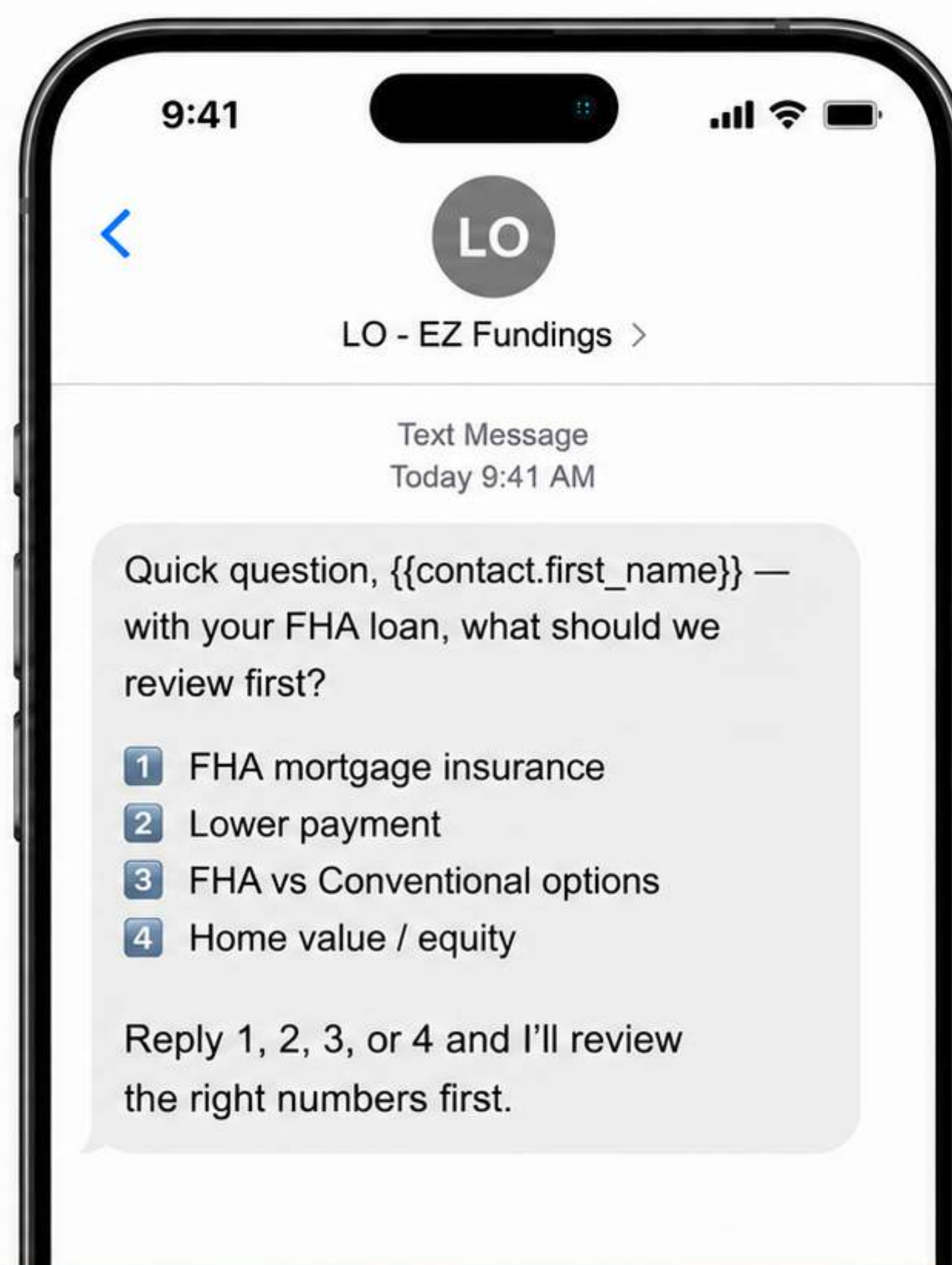


DAY 2

SMS



SMS





DAY 4

EMAIL #2

# FHA MORTGAGE INSURANCE



Subject: Are you still paying FHA mortgage insurance?



EMAIL PREVIEW (DESKTOP)

Subject: Are you still paying FHA mortgage insurance?  
From: {{user.name}} - EZ Fundings <{{user.email}}>  
To: {{contact.email}}



Hi {{contact.first\_name}},

One of the most important parts of an FHA review is mortgage insurance.

FHA mortgage insurance may still be part of your monthly payment, and depending on your original loan structure, it may not automatically go away the way many homeowners expect.

That is why reviewing your FHA loan can be helpful.

An FHA Loan Review can help check:

- Whether FHA mortgage insurance is still part of your payment
- Your current estimated home value
- Your estimated loan balance
- Your equity position
- Whether FHA-to-Conventional options may be worth comparing
- Whether your monthly payment could potentially improve

I broke it down simply here:



I'll review your mortgage insurance, loan balance, and estimated value so we can see if your FHA structure still makes sense.

[\[Check FHA Mortgage Insurance\]](#)



LANDING PAGE PREVIEW

https://ezfundings.com/first-time-buyer-plan



## FHA Mortgage Insurance



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Your information is protected.



**Quick & Easy**  
Takes less than 2 minutes.



**No Obligation**  
Just honest answers.



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LOAN OFFICER MARKETING AUTOMATION WORKFLOW



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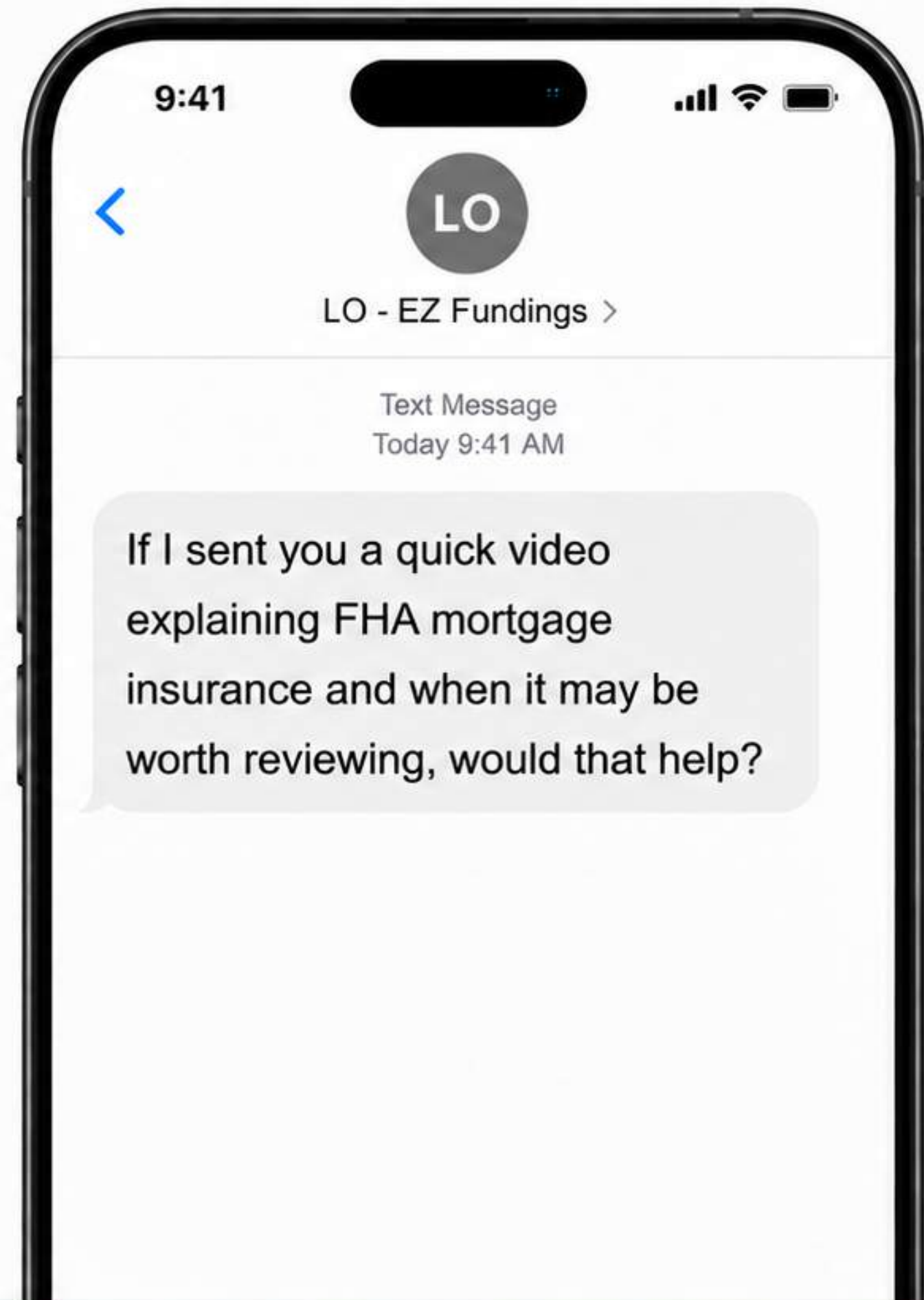


BETTER OUTCOMES

 **DAY 6** **SMS**

 **VIDEO TRIGGER**

 **SMS**





DAY 8

EMAIL #3

# FHA VS CONVENTIONAL



Subject: FHA vs Conventional — should we compare?



## EMAIL PREVIEW (DESKTOP)



Subject: FHA vs Conventional — should we compare?  
From: {{user.name}} - EZ Fundings <{{user.email}}>  
To: {{contact.email}}



Hi {{contact.first\_name}},

Your goals matter — whether it's lower payment, building equity, or more financial freedom.

That's why a side-by-side comparison of your current FHA loan versus possible Conventional options can be so helpful.

We can compare:

- Monthly payment
- Mortgage insurance
- Interest rate
- Cash to close
- Long-term savings

Here's a quick overview:



Shall we run the numbers and see what makes the most sense for you?

[\[Compare FHA vs Conventional\]](#)



## LANDING PAGE PREVIEW



https://ezfundings.com/fha-vs-conventional



## FHA Vs Conventional



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**Quick & Easy**  
Takes less than  
2 minutes.

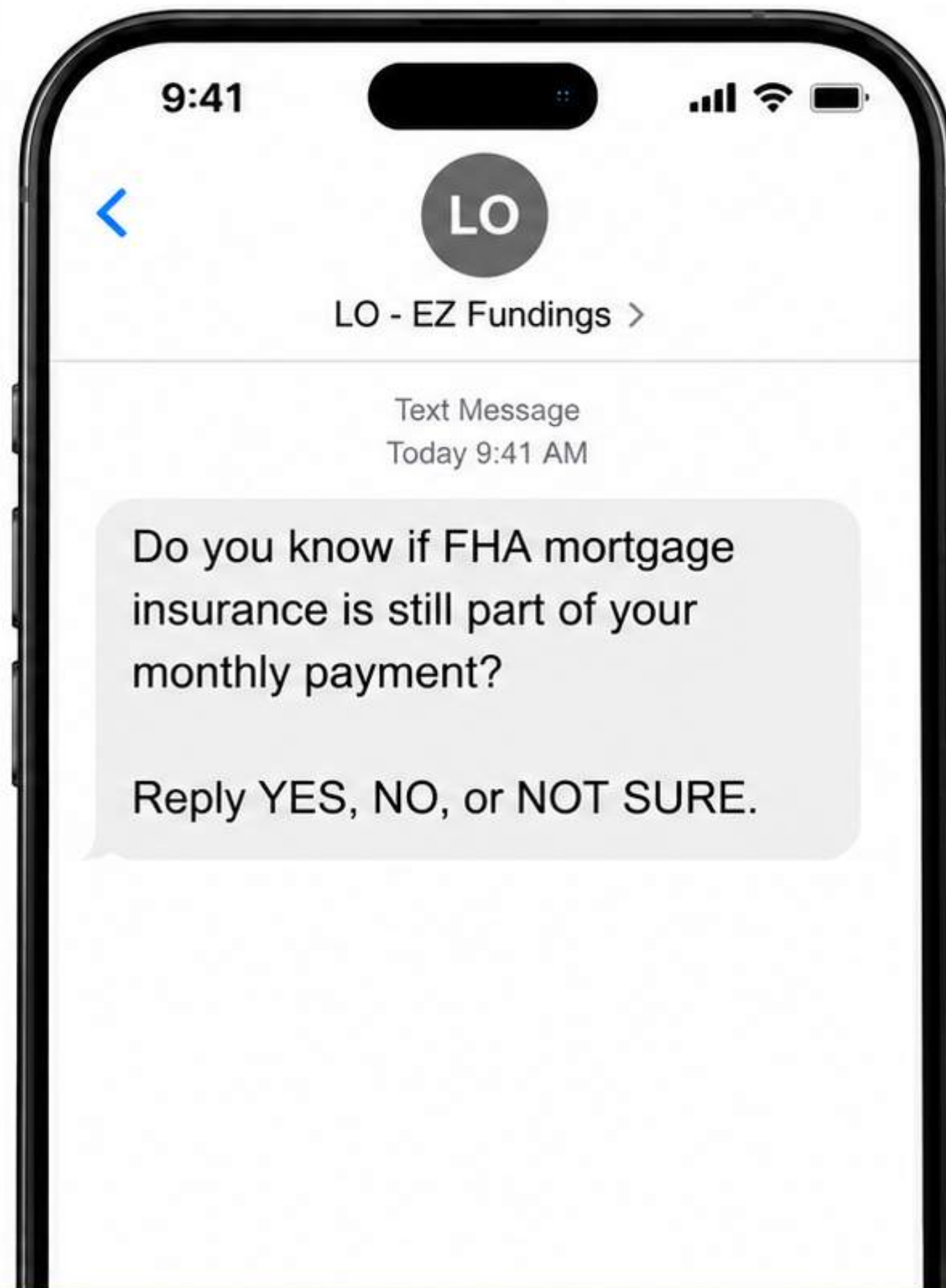


**No Obligation**  
Just honest  
answers.



 **DAY 9** **SMS**

 **SMS**





DAY 12

EMAIL #4

# CHOOSE YOUR FHA REVIEW PATH



Subject: What should we check on your FHA loan?



## EMAIL PREVIEW (DESKTOP)

View this email in browser

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Hi {{contact.first\_name}},

Not every FHA homeowner needs the same equity review.

Some need to know whether bank statements can help them qualify.

Some own a home and want to review cash-out or debt consolidation options.

Some were previously denied and need a second look.

Some want to buy.

Some want to refinance.

The best first step is choosing the path that fits you.



**CHOOSE YOUR SELF-EMPLOYED REVIEW PATH**

01



**Bank Statements**  
See if bank statements can support your income

02



**Cash-Out / Debt Consolidation**  
Explore cash-out or debt consolidation options

03



**Previously Denied**  
Get a second look at your situation

04



**Buy or Refi**  
Explore buying or refinancing options

Pick the path that fits your situation.

Choose the option that fits best:

- ★ **[I Want to See If Bank Statements Can Help]**  
We'll review whether your personal or business deposits may support your mortgage goals.
- ★ **[I Want Cash-Out or Debt Consolidation Options]**  
We'll review whether your home equity may support cash flow, consolidation, or restructuring.
- ★ **[I Was Previously Denied Because of Income]**  
We'll review whether your file may need a different documentation path.
- ★ **[I'm Not Sure]**  
No problem. We'll help identify the best starting point.

Want a full review?

- ★ **[Request My Self-Employed Mortgage Review]**



## LANDING PAGE PREVIEW

https://ezfundings.com/self-employed-review-path



### Choose Your Self-Employed Review Path

Enable sound



**CHOOSE YOUR SELF-EMPLOYED REVIEW PATH**

[Contact Me Now](#)



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Your information is protected.



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BETTER OUTCOMES

# CONDITIONAL RINGLESS VOICEMAIL #1



## ONLY IF NO ENGAGEMENT

Send only if no clicks, no replies, no video views, no form submits, and no booked review.



## VOICEMAIL SCRIPT

Hi **{{contact.first\_name}}**, this is **{{user.name}}** with EZ Fundings.  
I wanted to follow up because we sent over a quick FHA loan review invitation.  
If you still have an FHA loan, it may be worth checking your mortgage insurance, home value, equity, and current options.  
There is no obligation. We can simply review whether your FHA loan still fits your goals.  
You can call or text me at **{{user.phone}}**, or check your email for the FHA review link.  
Again, this is **{{user.name}}** with EZ Fundings.



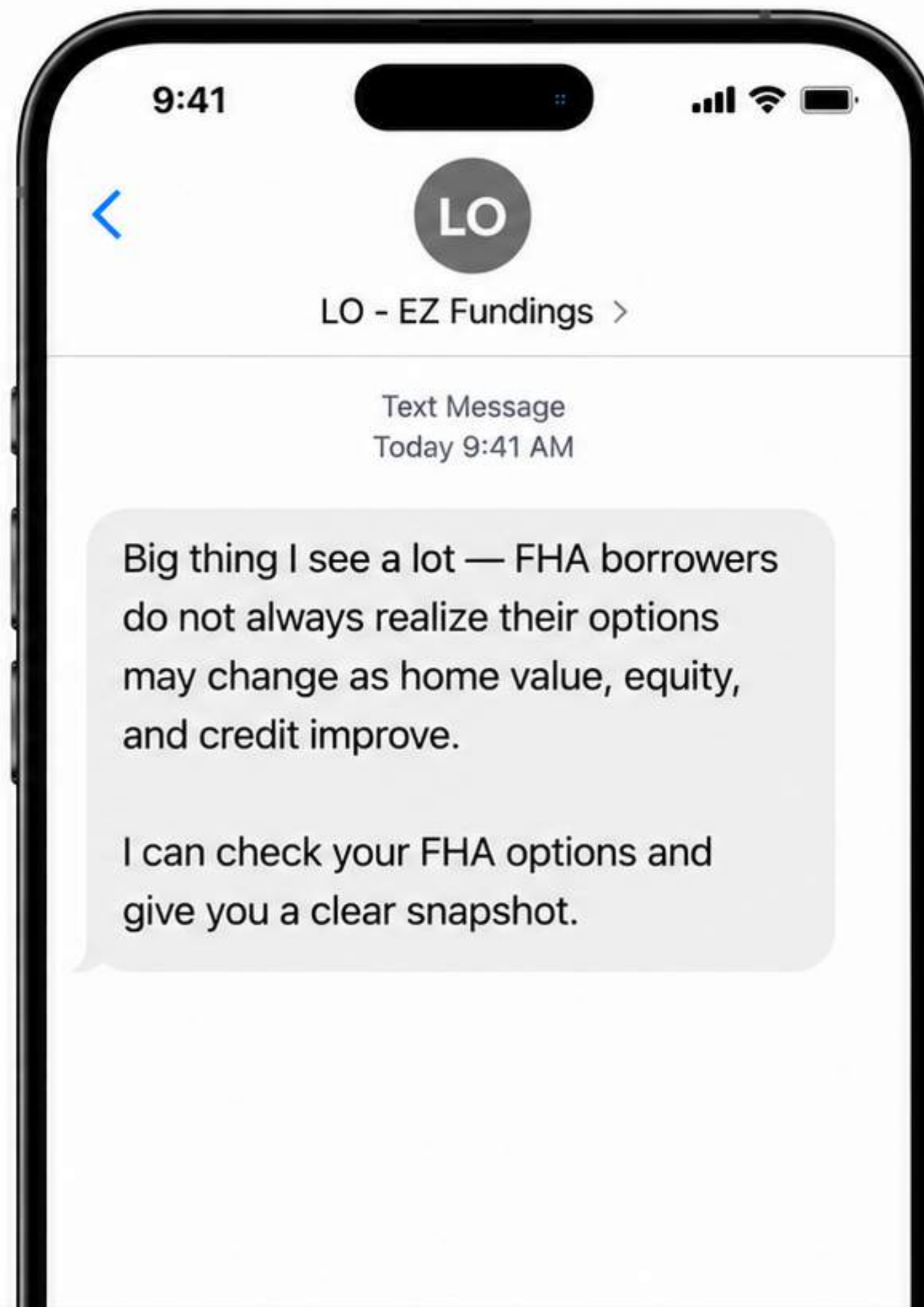


DAY 15

SMS



SMS



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BETTER OUTCOMES



DAY 18

EMAIL #5

# IMPROVED PROFILE **ANGLE**



**Subject:** You may qualify differently today



**EMAIL PREVIEW (DESKTOP)**



**Subject:** You may qualify differently today  
**From:** {{user.name}} - EZ Fundings <{{user.email}}>  
**To:** {{contact.email}}



Hi {{contact.first\_name}},

When you closed your FHA loan, the loan was based on your situation at that time.

But since then, things may have changed.

Your home value may be higher.

Your loan balance may be lower.

Your equity position may be stronger.

Your credit may have improved.

Your income or monthly debts may look different.

That means your options may also be different.



I'll review your FHA loan against where you are today and show you which of your current situation still makes sense.

[\[Run My FHA Loan Review\]](#)



**LANDING PAGE PREVIEW**



<https://ezfundings.com/high-interest-debt-can-add-up>



## YOU MAY QUALIFY DIFFERENTLY TODAY

[Contact Me Now](#)



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BETTER OUTCOMES



DAY 20

LO CHECK-IN

# LO CHECK-IN



CONDITIONAL ACTION

Choose the path based on **engagement status**.



**IF NOT ENGAGED —**  
**Manual SMS**



**IF ENGAGED —**  
**LO Call Task**

OR



**TASK TITLE:**

Call borrower — engaged with  
Self-Employed Mortgage Review



**SUGGESTED OPENER:**

Hi **{{contact.first\_name}}**, this is  
**{{user.first\_name}}** with EZ Fundings.  
I saw you were checking self-employed  
mortgage options. I wanted to call  
personally and see whether you are trying  
to use bank statements, review cash-out  
options, get a second look after being  
denied, buy, or refinance.



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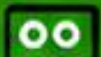
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BETTER OUTCOMES



DAY 22

CONDITIONAL RINGLESS VOICEMAIL #2

# CONDITIONAL RINGLESS VOICEMAIL #2



## ONLY IF NO ENGAGEMENT

Send only if no clicks, no replies, no video views, no form submits, no booked review.



## RVM SCRIPT

Hi **{{contact.first\_name}}**, this is **{{user.name}}** with EZ Fundings.

Just a quick reminder — if you still have an FHA loan, we can review whether your current loan still makes sense based on your mortgage insurance, home value, equity, and available options.

No pressure. Just a simple FHA loan review.

You can call or text me back at **{{user.phone}}**, or click the review link in your email.

Again, this is **{{user.name}}** with EZ Fundings.



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BETTER OUTCOMES



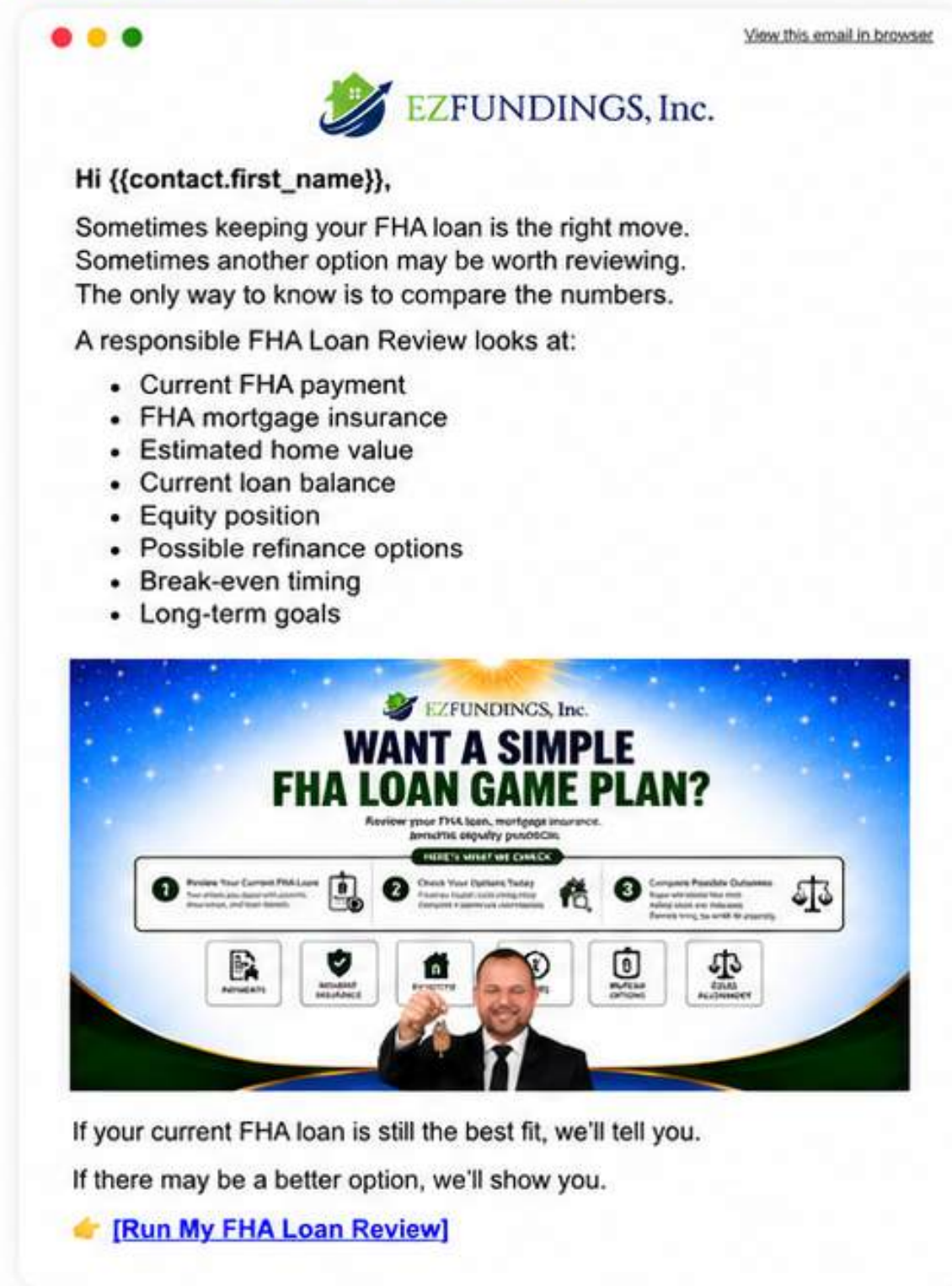
DAY 24

EMAIL #6

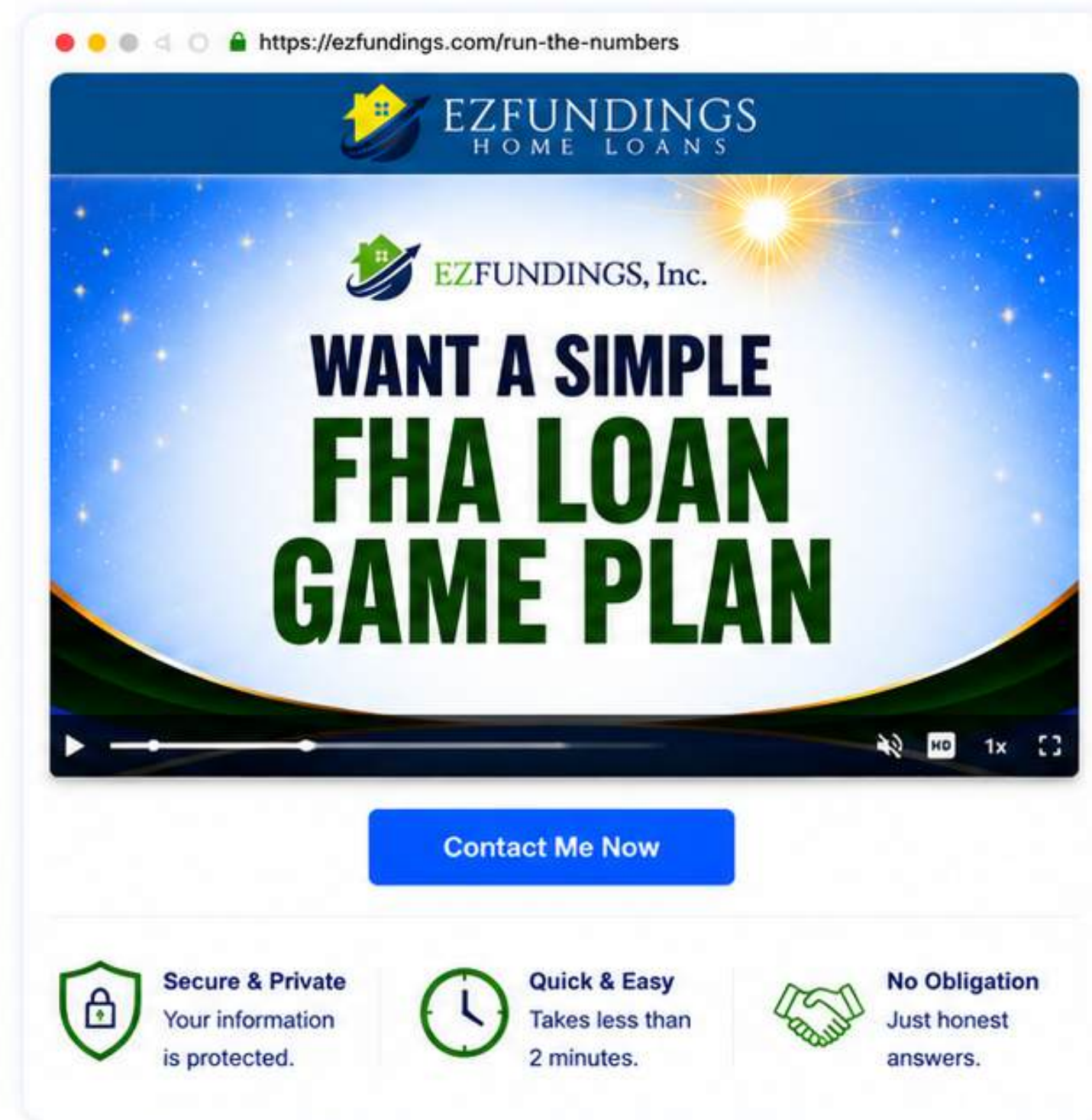
# FINAL EDUCATION / REVIEW PROMPT

✉ Subject: Sometimes FHA is still the right fit

## ✉ EMAIL PREVIEW (DESKTOP)



## 🚀 LANDING PAGE PREVIEW



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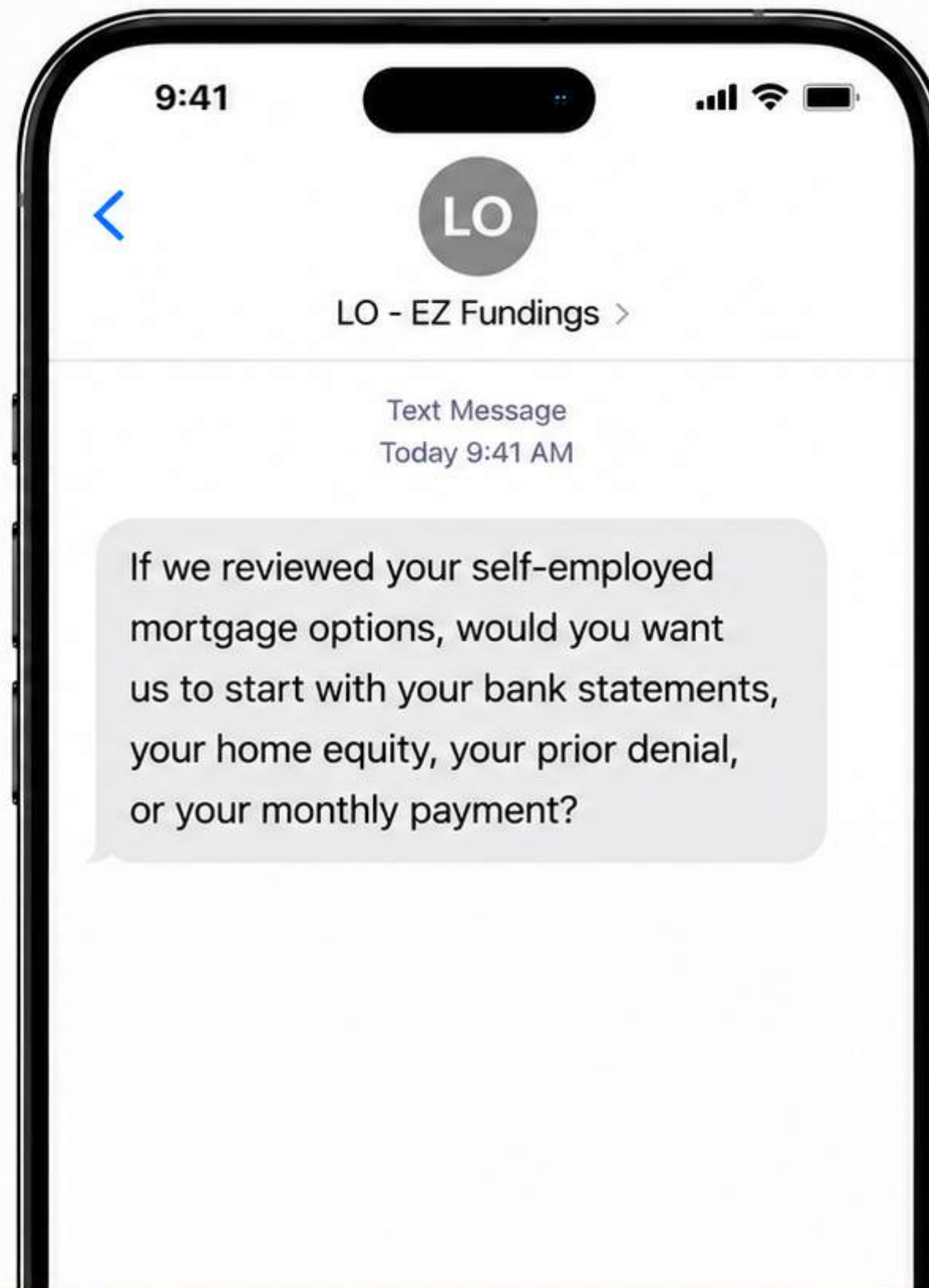


DAY 26

SMS #5



SMS



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BETTER OUTCOMES



DAY 29

FINAL EMAIL

# FINAL EMAIL



Subject: Want a simple FHA loan game plan?



From: {{user.name}} - EZ Fundings <{{user.email}}>  
To: {{contact.email}}  
Subject: Want a simple FHA loan game plan?



EZFUNDINGS, Inc.

Hi {{contact.first\_name}},

Final note on this.

If you still have an FHA loan, it may be worth reviewing whether it still fits your goals.

We can check your mortgage insurance, estimated home value, loan balance, equity, payment, and possible FHA vs Conventional options.

No pressure.  
Just clarity.

 [\[Review My FHA Options\]](#)

Thank you,  
{{user.name}}



## WHAT THIS EMAIL DOES

Delivers a final, value-packed message that invites the client to review their FHA loan options.



## KEY BENEFITS



Check your mortgage insurance, home value, loan balance, and equity.



Explore payment and loan structure options, including FHA vs Conventional.



Review potential savings and cash-out opportunities.



Evaluate how changes could impact your monthly payment.



No pressure. Just clarity and guidance to help you decide.



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BETTER OUTCOMES



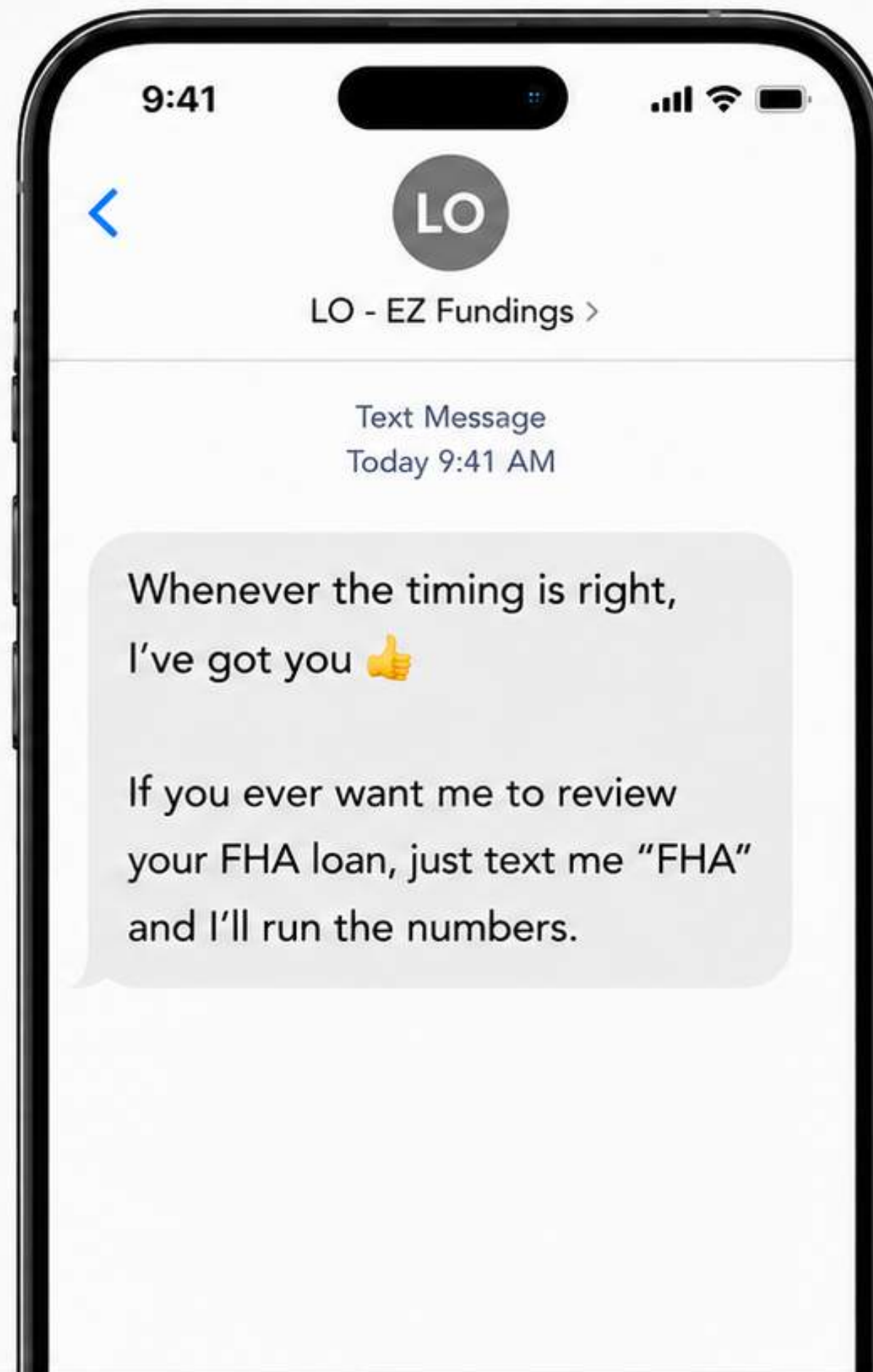
DAY 30

FINAL TEXT

# FINAL TEXT



## SMS



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BETTER OUTCOMES