

VA REVIEW

AUTOMATED MARKETING CAMPAIGN

EZ Flow 3.0



CAMPAIGN GOAL

Move VA borrowers into a focused review of their VA loan benefits, refinance options, VA IRRRL possibilities, cash-out options, equity position, and buy-again opportunities.



PRIMARY CTA

 **[Review My VA Benefits]**



SECONDARY CTAS

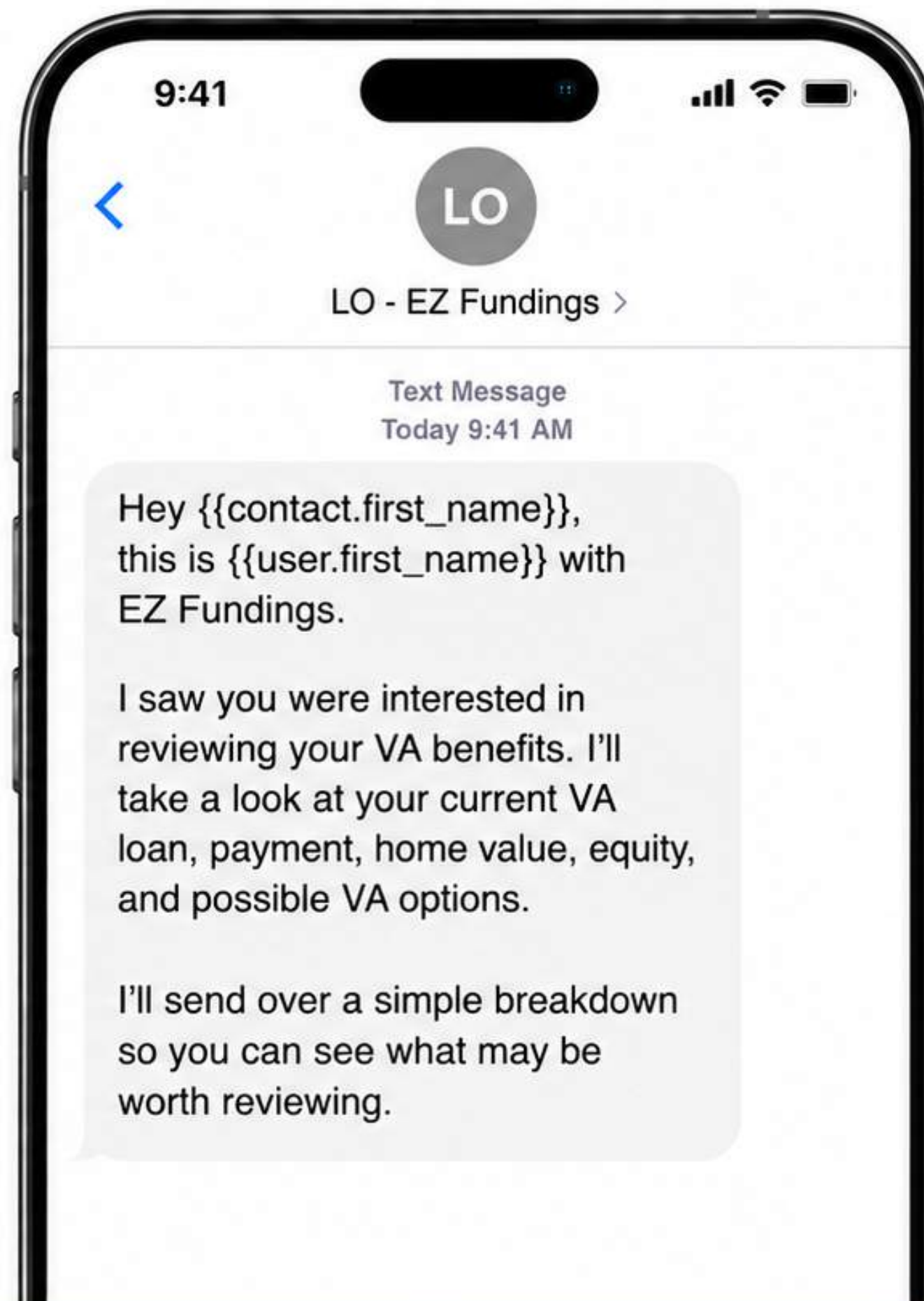
-  **[Check My VA Payment Options]**
-  **[Review VA Refinance Options]**
-  **[Review VA Cash-Out Options]**
-  **[Buy Again With VA]**



DAY 0 — LO MANUAL TEXT



SMS



EZFUNDINGS, Inc.



TRUSTED PARTNER



CLIENT FOCUSED



BETTER OUTCOMES



DAY 1 — EMAIL #1

INTRO + VIDEO



Subject: Your VA benefits may be worth reviewing



EMAIL PREVIEW (DESKTOP)

Subject: Your VA benefits may be worth reviewing
From: EZ Fundings <{{user.email}}>
To: {{contact.email}}



Hi {{contact.first_name}},

Because you used a VA loan, it may be worth reviewing your current options from time to time.

A lot may have changed since you closed.

Your home value may have increased.

Your loan balance may be lower.

Your equity may have changed.

Rates and loan programs may have shifted.

And your financial goals may look different today.

A VA Benefit Review helps us determine whether your current VA loan still fits your life today.

We can review:

- VA payment options
- VA refinance options
- VA IRRRL possibilities, if applicable
- VA cash-out options
- Current home value and equity
- Whether your VA benefit could help you buy again

I put together a quick video that explains how the VA Benefit Review works:



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

Choose where you want to start:

- 👉 [\[Check My VA Payment Options\]](#)
- 👉 [\[Review VA Refinance Options\]](#)
- 👉 [\[Review VA Cash-Out Options\]](#)
- 👉 [\[Buy Again With VA\]](#)



LANDING PAGE PREVIEW

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



VA Benefit Review



Contact Me Now



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Quick & Easy
Takes less than 2 minutes.



No Obligation
Just honest answers.

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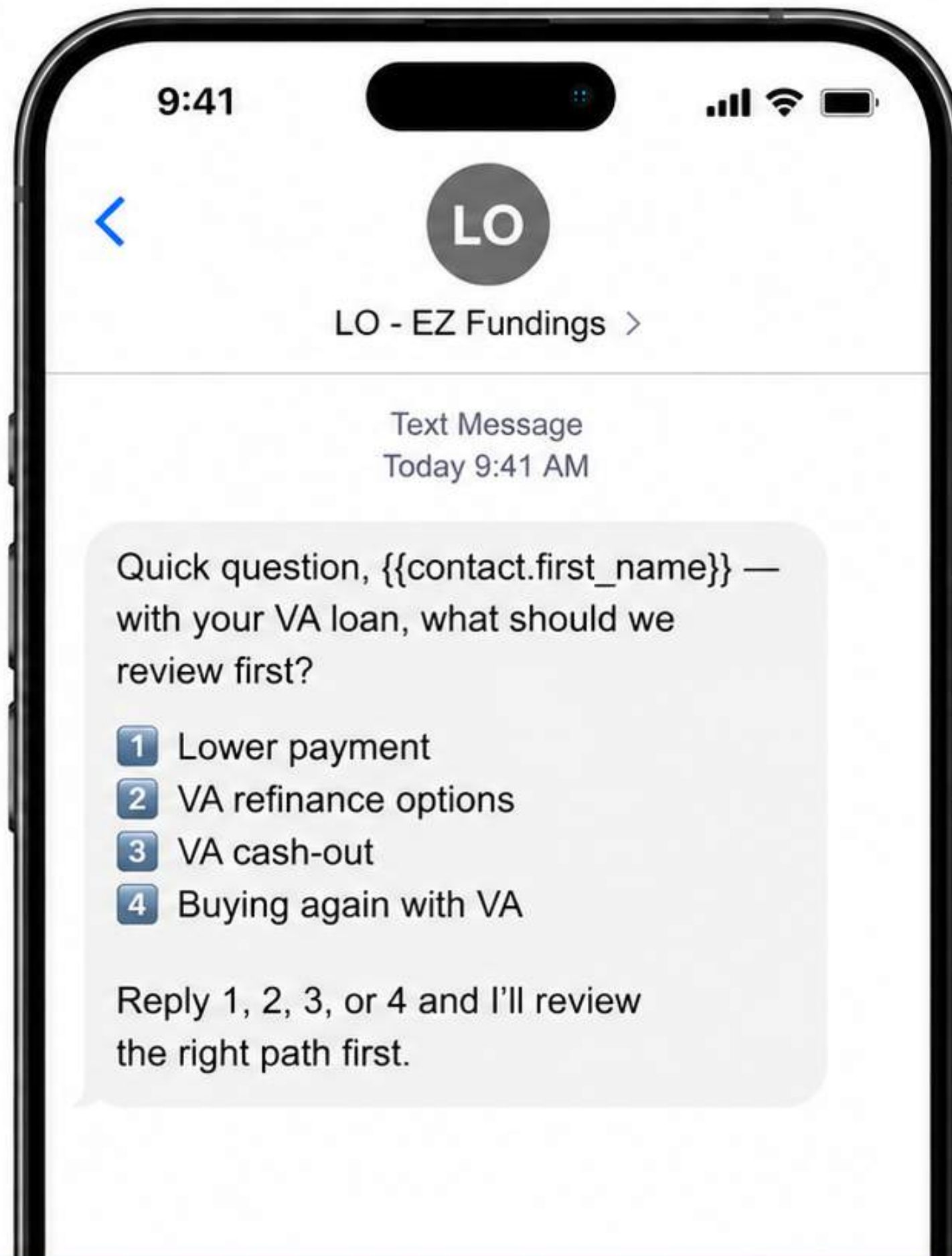




DAY 2 — SMS



SMS





DAY 4 EMAIL #2

VA OPTIONS OVERVIEW



Subject: VA homeowners have unique options



EMAIL PREVIEW (DESKTOP)

Subject: VA homeowners have unique options
From: EZ Fundings <{{user.email}}>
To: {{contact.email}}



EZFUNDINGS, Inc.

Hi {{contact.first_name}},

VA borrowers may have options that are different from other homeowners.

Depending on your current loan, goals, equity, and eligibility, your VA review may include:

- VA refinance options
- VA IRRRL review
- VA cash-out refinance
- Payment savings review
- Buying again with VA eligibility
- Reviewing whether your current VA loan still makes sense

The important thing is to compare your current loan against your current situation.

I broke it down simply here:



I'll review your current VA loan and map out the VA options that may apply.

[\[Review My VA Benefits\]](#)



LANDING PAGE PREVIEW

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



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HOME LOANS

VA Loan
Options



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answers.



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LOAN OFFICER MARKETING AUTOMATION WORKFLOW



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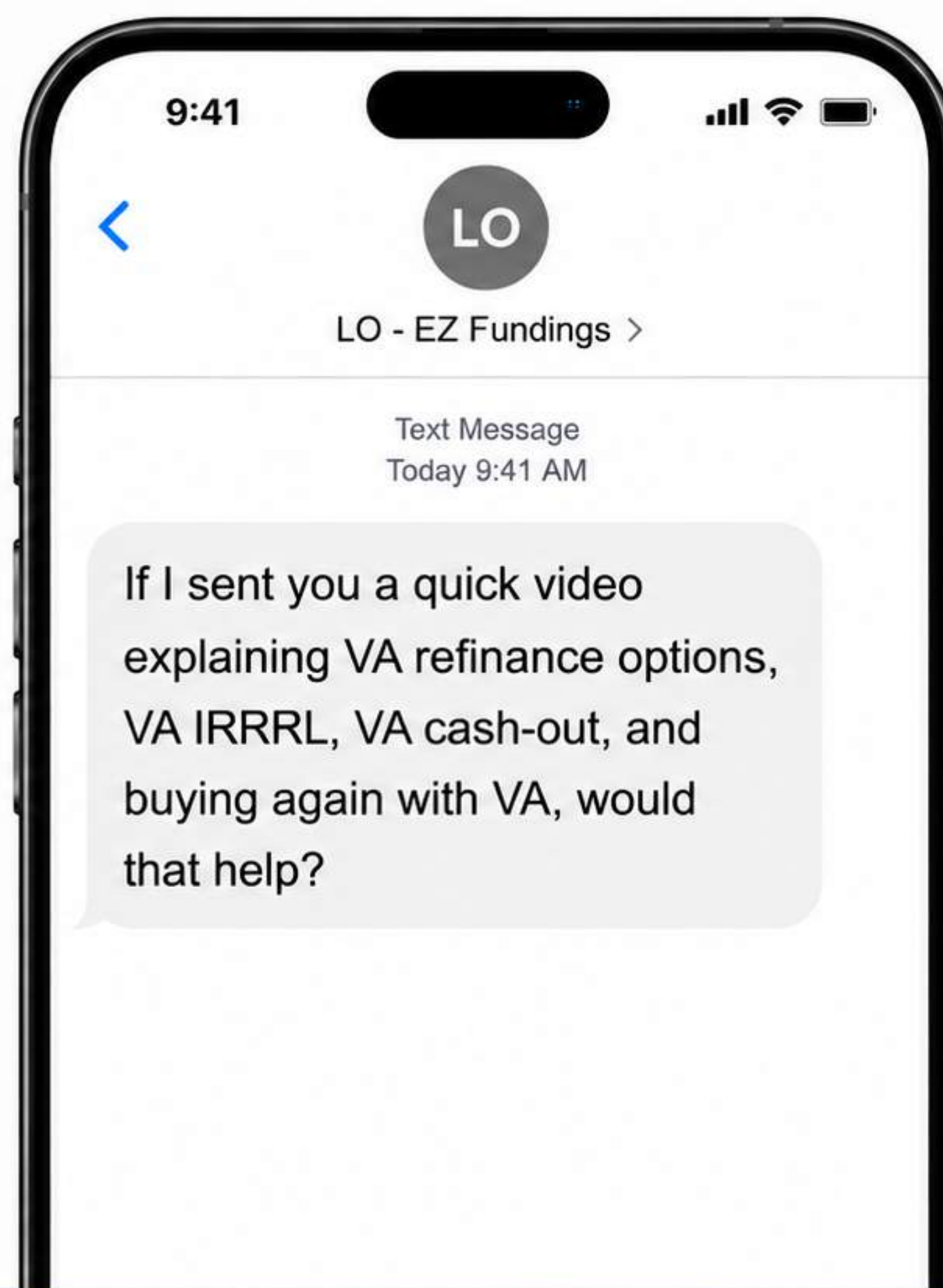
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BETTER OUTCOMES

 DAY 6 **SMS**

 SMS





DAY 8

EMAIL #3

VA PAYMENT / REFI ANGLE



Subject: Could your VA loan payment be lower?



EMAIL PREVIEW (DESKTOP)

Subject: Could your VA loan payment be lower?
From: {{user.name}} - EZ Fundings <{{user.email}}>
To: {{contact.email}}



Hi {{contact.first_name}},

One reason VA homeowners request a review is to see whether their current payment could potentially be improved.

Depending on your current VA loan, rate, balance, and available options, it may be worth comparing your current payment against VA refinance options.

For some VA borrowers, a VA IRRRL may be worth reviewing.

For others, the best answer may be to keep the current loan.

A VA Benefit Review can help compare:

- Your current VA loan
- Current payment
- Possible payment options
- VA refinance possibilities
- Break-even timing
- Whether the numbers make sense

Here's a quick breakdown:



I'll compare your current VA loan against available options and show you whether the numbers make sense.

[\[Check My VA Payment Options\]](#)



LANDING PAGE PREVIEW

https://ezfundings.com/could-your-va-payment-be-lower



Could Your VA Payment Be Lower



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2 minutes.



No Obligation
Just honest
answers.



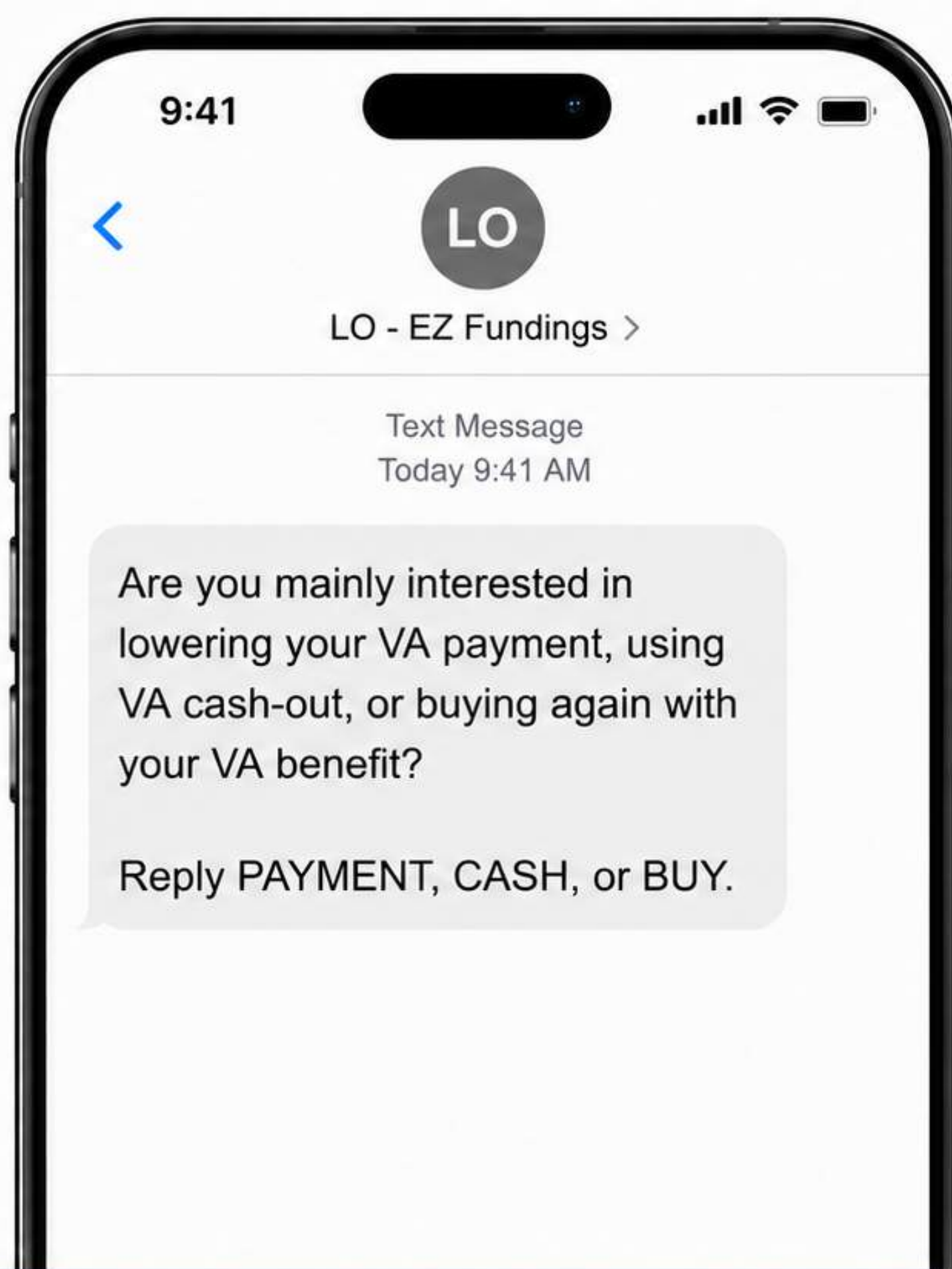


DAY 9

SMS



SMS



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BETTER OUTCOMES



DAY 12

EMAIL #4

CHOOSE YOUR VA REVIEW PATH



Subject: What should we check on your VA benefits?



EMAIL PREVIEW (DESKTOP)

View this email in browser

 EZFUNDINGS, Inc.

Hi {{contact.first_name}},

Every VA borrower's situation is different.

Some want to know whether their payment could be lower.

Some want to review VA refinance options.

Some want to see whether VA cash-out makes sense.

Some want to know whether they can use their VA benefit to buy again.

**CHOOSE YOUR
VA REVIEW PATH**

 VA Payment

 VA Refinance

 VA Cash-Out

 Buy Again

Start with **your** goal. We'll check the benefit.

Choose where you want to start:

-  **[Lower My VA Payment]**
Review possible VA payment options.
-  **[Review VA Refinance Options]**
Compare your current VA loan against available VA options.
-  **[Review VA Cash-Out]**
Check whether your equity could support a VA cash-out option.
-  **[Buy Again with VA]**
Review how your VA benefit may help with another purchase.

I'll review the option you choose and follow up with a clear plan.



LANDING PAGE PREVIEW

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

 EZFUNDINGS
HOME LOANS

Choose Your VA Review Path

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CHOOSE YOUR VA REVIEW PATH

[Contact Me Now](#)

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Your information
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Takes less than
2 minutes.

 **No Obligation**
Just honest
answers.



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 VA Benefit Review invitation.

If you still have a VA loan, it may be worth checking whether your current loan still fits your goals, or whether VA refinance, VA cash-out, or buying again may be worth reviewing.

There is no obligation. We can simply check your VA options.

You can call or text me at **{{user.phone}}**, or check your email for the VA review link.

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



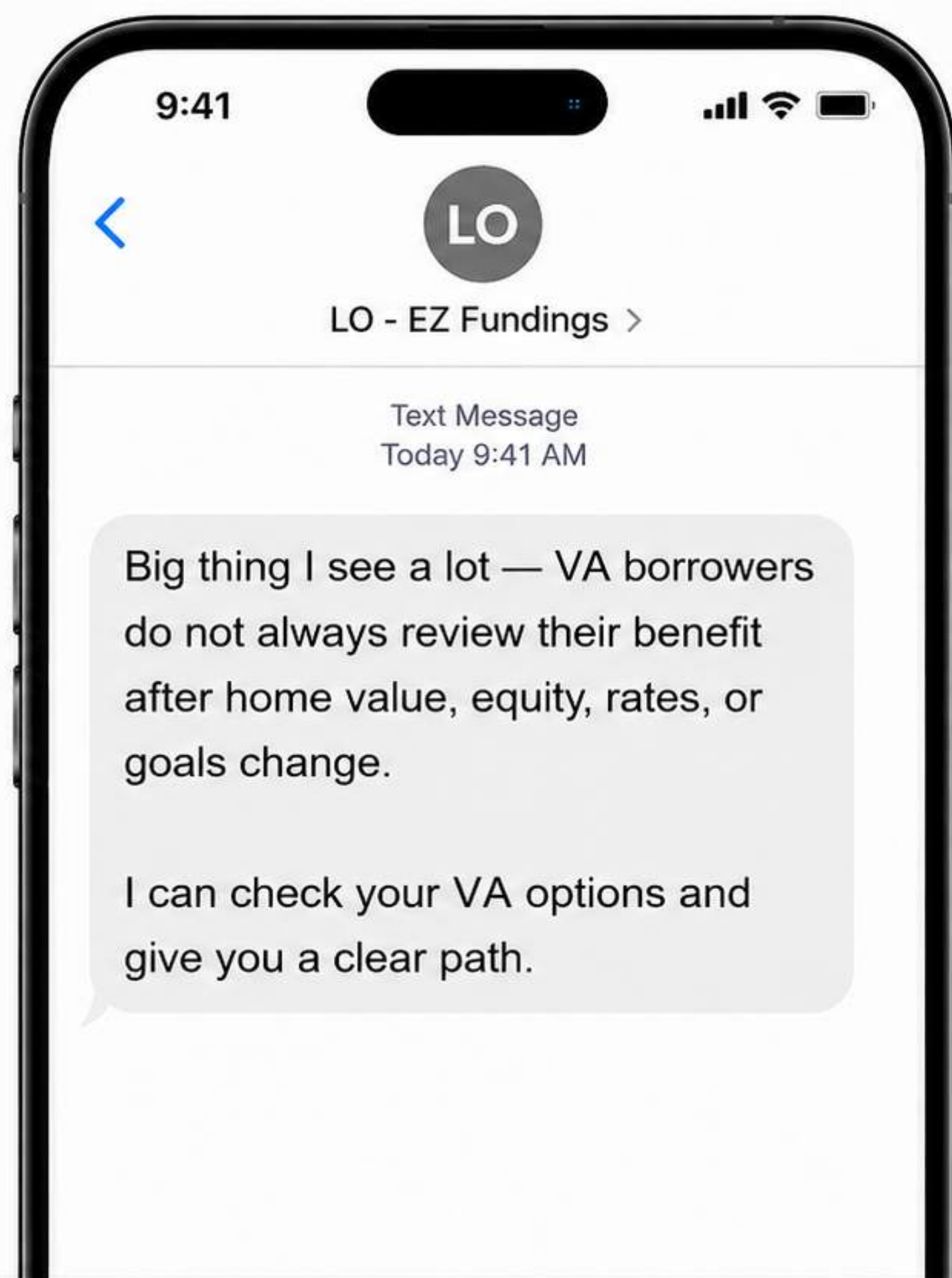


DAY 15

SMS



SMS





DAY 18

EMAIL #5

VA CASH-OUT / EQUITY ANGLE



Subject: Your VA benefit and home equity



EMAIL PREVIEW (DESKTOP)

Subject: Your VA benefit and home equity
From: {{user.name}} - EZ Fundings <{{user.email}}>
To: {{contact.email}}



Hi {{contact.first_name}},

If your home value has increased or your loan balance has gone down, you may have more equity available than you think.

This could be used to pay off debt, cover expenses, make home improvements, or reach other goals.

Some borrowers use their VA cash-out for:

- Debt consolidation
- Cash reserves
- Home upgrades
- Major expenses
- Replacing high-rate loan structure

This is not the right move for everyone.

A VA Benefit Review can help compare your current loan, equity, possible cash-out amount, payment impact, and loan term goals.



I'll review your VA loan and equity position to see if a cash-out option makes sense for you.

[\[Review VA Cash-Out Option\]](#)



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https://ezfundings.com/va-cash-out-review



VA CASH-OUT REVIEW

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2 minutes.



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Just honest
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BETTER OUTCOMES



DAY 20

LO CHECK-IN

LO CHECK-IN

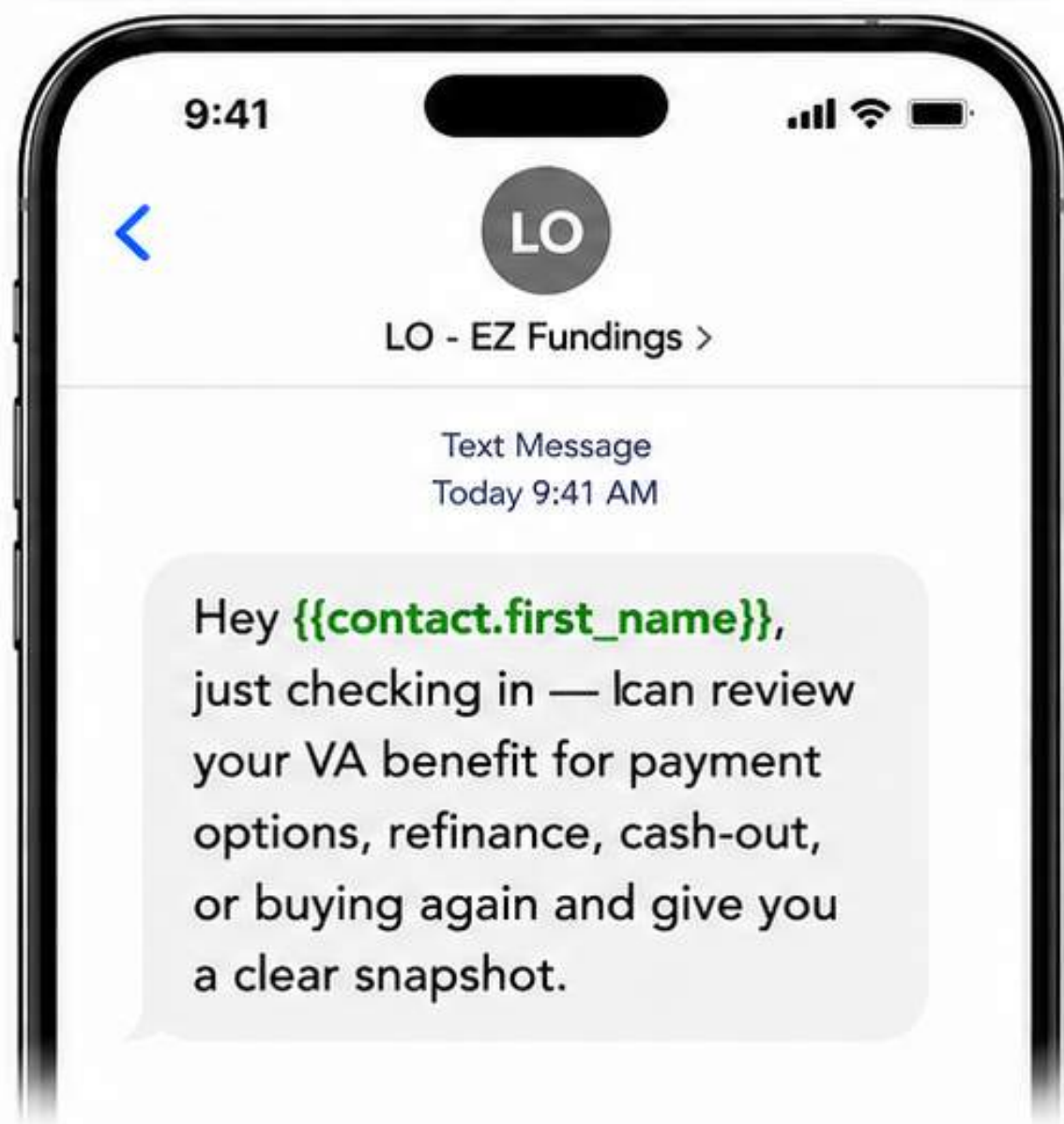


CONDITIONAL ACTION

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



IF NOT ENGAGED —
Manual SMS



IF ENGAGED —
LO Call Task



TASK TITLE:

Call borrower — engaged with
VA Benefit Review



SUGGESTED OPENER:

Hi **{{contact.first_name}}**, this is
{{user.first_name}} with EZ Fundings.
I saw you were checking your VA benefits.
I'm going to walk you through the key
options — payment, VA refinance, VA
cash-out, or buying again — and help
identify the best place to start.

OR



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BETTER OUTCOMES

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 a VA loan,
we can review whether your VA benefit still fits your goals today.
We can check possible payment options, VA refinance,
VA cash-out, or buying again with VA.
No pressure. Just a simple VA Benefit 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.





DAY 24

EMAIL #6

FINAL EDUCATION / REVIEW PROMPT



Subject: Sometimes your current VA loan is still the best fit



EMAIL PREVIEW (DESKTOP)

View this email in browser

 **EZFUNDINGS, Inc.**

Hi {{contact.first_name}},

Sometimes a VA refinance makes sense.
Sometimes VA cash-out may be worth reviewing.
Sometimes buying again with your VA benefit is the next step.
And sometimes the smartest move is to keep your current VA loan exactly the way it is.
That's why we start with a review.

A responsible VA Benefit Review looks at:

- Current VA loan
- Current payment
- Home value
- Loan balance
- Equity position
- VA refinance options
- VA cash-out options
- Purchase goals
- Break-even timing

If your current loan is still the best fit, we'll tell you.



If there may be options worth reviewing, we'll show you.

 [\[Run My VA Benefit Review\]](#)



LANDING PAGE PREVIEW

https://ezfundings.com/review-va-benefit-options

 **EZFUNDINGS**
HOME LOANS

 **EZFUNDINGS, Inc.**

WANT A SIMPLE VA BENEFIT GAME PLAN?

Review your VA loan, payment options, equity, and available VA benefits.

[Contact Me Now](#)

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Takes less than 2 minutes.

 **No Obligation**
Just honest answers.



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BETTER OUTCOMES

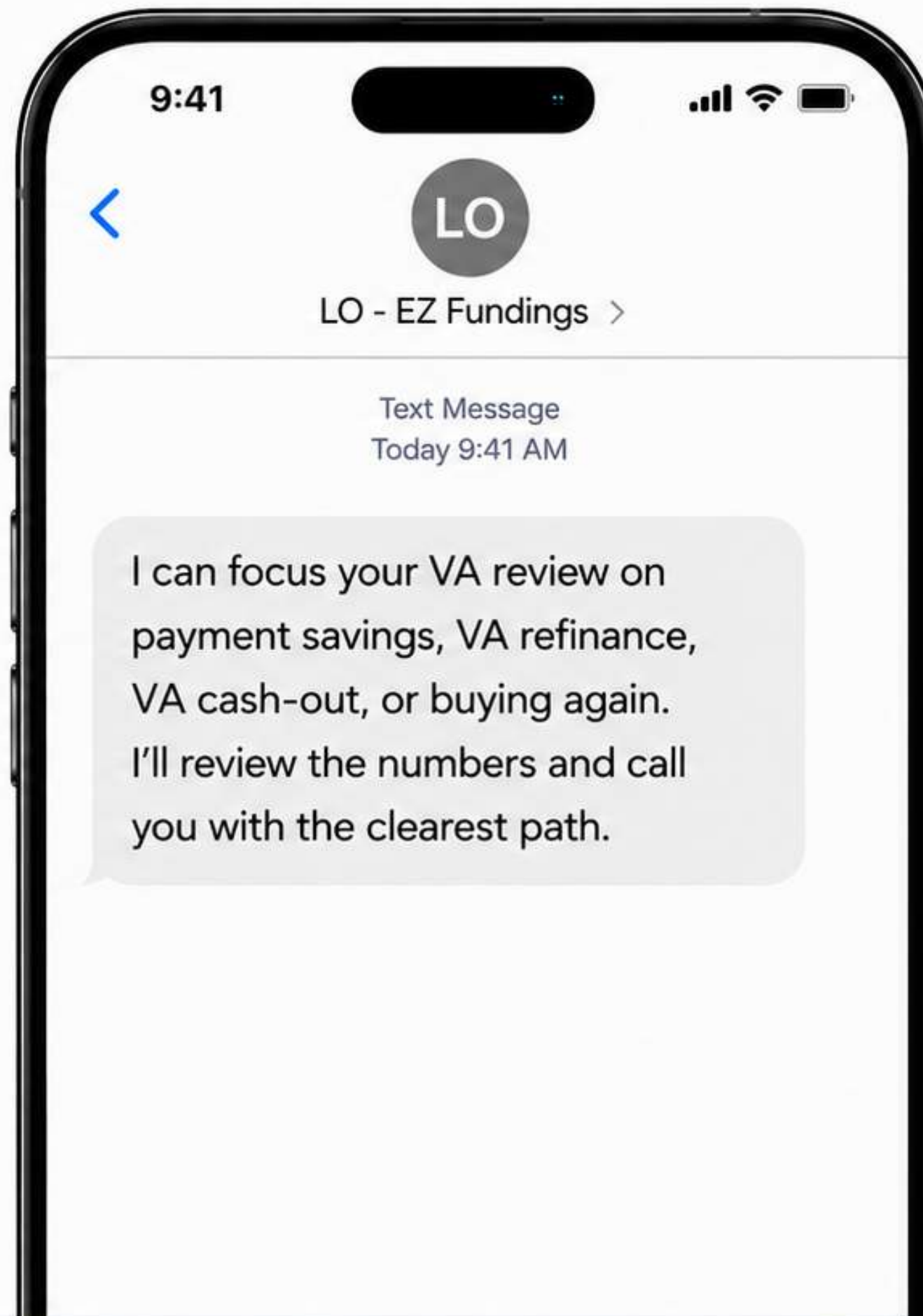


DAY 26 SMS



SMS

I can focus your VA review on payment savings, VA refinance, VA cash-out, or buying again. I'll review the numbers and call you with the clearest path.



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BETTER OUTCOMES



DAY 29

FINAL EMAIL

FINAL EMAIL



Subject: Want a simple VA benefit game plan?

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



EZFUNDINGS, Inc.

Hi {{contact.first_name}},

Final note on this.

If you have a VA loan or VA eligibility, it may be worth reviewing whether your benefit still fits your current goals.

We can check payment options, VA refinance, VA cash-out, home equity, or buying again with VA.

No pressure.

Just clarity.

 [\[Review My VA Benefits\]](#)

Thank you,

{{user.name}}



WHAT THIS EMAIL DOES

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



KEY BENEFITS



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



Explore payment and loan structure options, including VA refinance and VA cash-out.



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

