

REVERSE MORTGAGE SUPPORT

AUTOMATED MARKETING CAMPAIGN

EZ Flow 3.0



CAMPAIGN GOAL

Move reverse mortgage prospects, older homeowners, or family decision influencers into a supportive conversation about reverse mortgage questions, home equity, family concerns, and future planning.



PRIMARY CTA



[Request a Reverse Mortgage Check-In]



SECONDARY CTAS



[Ask a Reverse Mortgage Question]



[Get Family Questions Answered]



[Review My Home Equity]



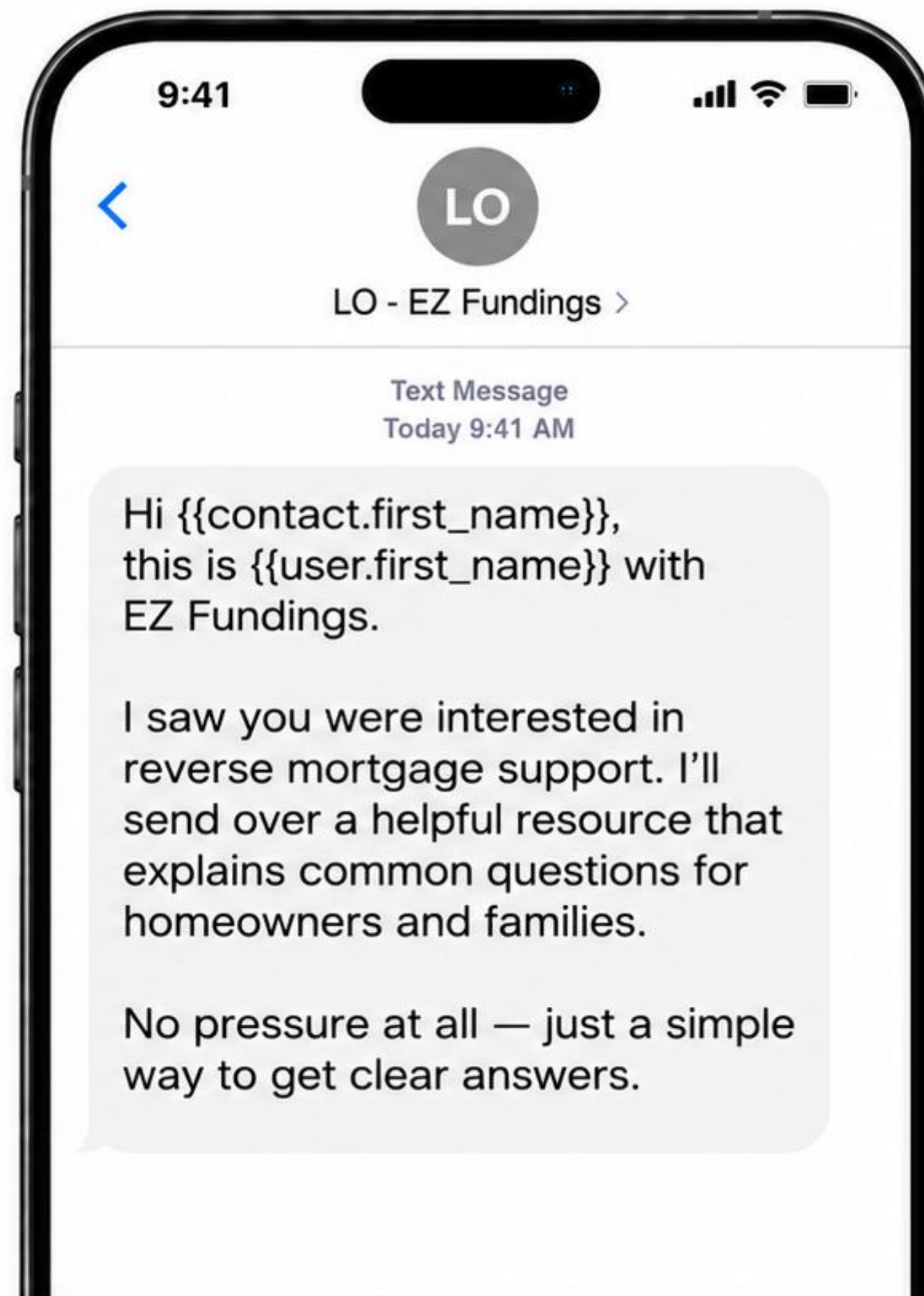
[Schedule a Support Call]



DAY 0 — LO MANUAL TEXT



SMS





DAY 1 – EMAIL #1

INTRO + VIDEO



Subject: A quick reverse mortgage check-in



EMAIL PREVIEW (DESKTOP)

Subject: A quick reverse mortgage check-in
From: EZ Fundings <{{user.email}}>
To: {{contact.email}}



Hi {{contact.first_name}},

I wanted to follow up because you showed interest in reverse mortgage support.

Reverse mortgages can be helpful, but they can also create questions for homeowners and families over time.

Common questions include:

- How does a reverse mortgage work?
- What should my family understand?
- How does home equity factor in?
- What happens if I move?
- What happens if the home is sold?
- What options may be available in the future?

I put together a short video that answers some common questions:



I'll help you get clear answers and review the right next step based on your situation.

Choose where you want to start:

- 👉 [\[Request a Reverse Mortgage Check-In\]](#)
- 👉 [\[Ask a Reverse Mortgage Question\]](#)
- 👉 [\[Get Family Questions Answered\]](#)
- 👉 [\[Review My Home Equity\]](#)



LANDING PAGE PREVIEW

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



Reverse Mortgage Support



Contact Me Now



Secure & Private
Your information is protected.



Quick & Easy
Takes less than 2 minutes.



No Obligation
Just honest answers.

EZFUNDINGS INC | NMLS ID #1156892 Copyright 2026 ©

| NMLS ID #1156802 | FAIR LENDER | FAIR HOUSING | NMLS CONSUMER ACCESS #1156892

[COMPANY STATE LICENSES](#) [PRIVACY POLICY TERMS & CONDITIONS](#)

This email and any files transmitted with it are confidential and intended solely for the use of the individual or entity to which they are addressed. If you have received this email in error, please notify the sender immediately. Please note that any views or opinions presented in this email are solely those of the author and do not necessarily represent those of the company. Finally, the recipient should check this email and any attachments and even links for the presence of viruses. The company accepts no liability for any damage caused by any virus transmitted by this email.



EZFUNDINGS, Inc.

LOAN OFFICER MARKETING AUTOMATION WORKFLOW



TRUSTED PARTNER



CLIENT FOCUSED



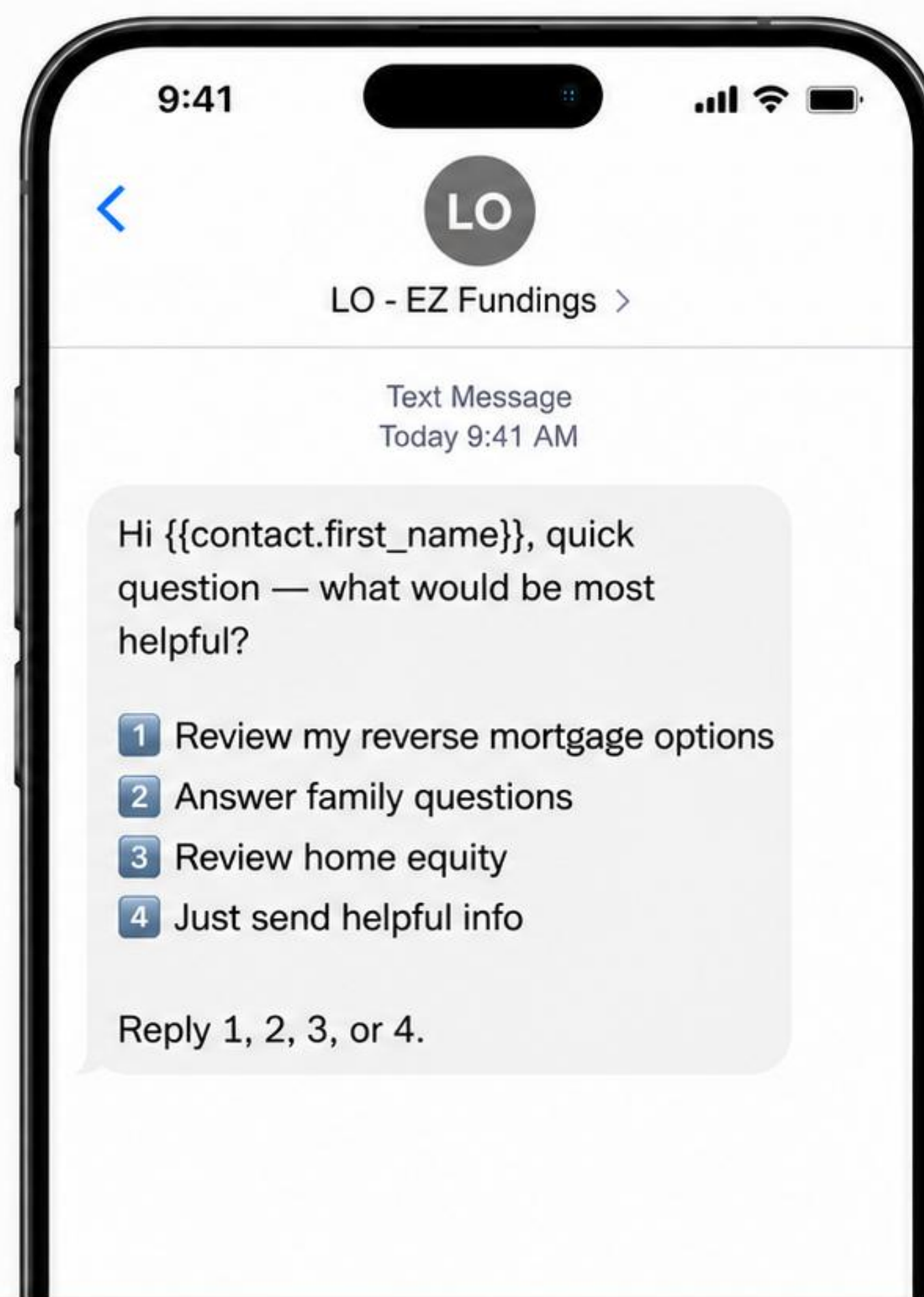
BETTER OUTCOMES



DAY 2 — SMS



SMS



**DAY 4****EMAIL #2**

COMMON QUESTIONS

**Subject: Common reverse mortgage questions****EMAIL PREVIEW (DESKTOP)**

Subject: Common reverse mortgage questions
From: EZ Fundings <{{user.email}}>
To: {{contact.email}}

**EZFUNDINGS, Inc.**

Hi {{contact.first_name}},

Reverse mortgages can be helpful, but they can also raise questions over time.

Some common questions include:

- Do I still own my home?
- What responsibilities do I still have?
- What happens if I move?
- What should my family know?
- How does the loan get repaid?
- What happens if the home is sold?

These are normal questions, and we're happy to help answer them clearly.

I broke down a few common answers here:



I'll help you or your family get clear answers.

👉 [\[Ask a Reverse Mortgage Question\]](#)

**LANDING PAGE PREVIEW**

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

**EZFUNDINGS**
HOME LOANS

Common Reverse Mortgage Questions

[Contact Me Now](#)

Secure & Private
Your information
is protected.



Quick & Easy
Takes less than
2 minutes.



No Obligation
Just honest
answers.

© 2026 EZFUNDINGS INC | NMLS ID #1156892 Copyright 2026 ID

| NMLS ID #1156892 | FAIR LENDER | FAIR HOUSING | NMLS CONSUMER ACCESS #1156892

COMMON STATE LICENSES | [PRIVACY POLICY](#) | [TERMS & CONDITIONS](#)

This email and any files transmitted with it are confidential and intended solely for the use of the individual or entity to which they are addressed. If you have received this email in error, please notify the sender immediately. Please note that any views or opinions presented in this email are solely those of the author and do not necessarily represent those of the company. Finally, the recipient should check this email and any attachments and even links for the presence of viruses. The company accepts no liability for any damage caused by any virus transmitted by this email.

**EZFUNDINGS, Inc.**

LOAN OFFICER MARKETING AUTOMATION WORKFLOW



TRUSTED PARTNER



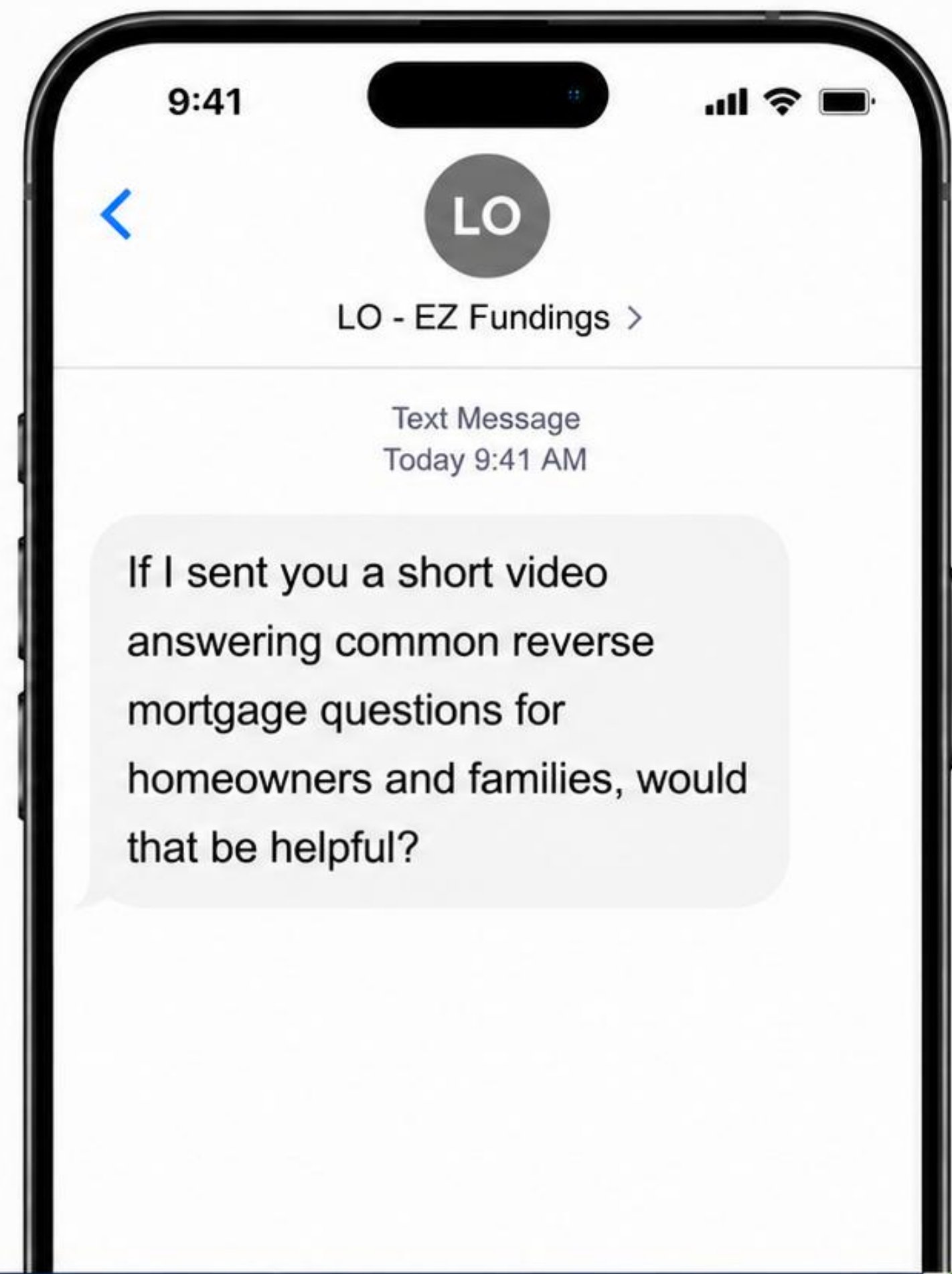
CLIENT FOCUSED



BETTER OUTCOMES

 DAY 6 – SMS

 SMS





DAY 8

EMAIL #3

FAMILY SUPPORT ANGLE



Subject: What should your family know?



EMAIL PREVIEW (DESKTOP)

Subject: What should your family know?
From: EZ Fundings <{{user.email}}>
To: {{contact.email}}



Hi Leo Cornelio,

Many reverse mortgage clients want their family to understand how the loan works.

That is completely reasonable.

Family members may want to know:

- How the loan works
- What happens if the homeowner moves
- What happens if the home is sold
- What responsibilities remain
- How repayment works
- Who to contact with questions

If it would be helpful, we can provide a simple family-friendly explanation or schedule a support call.

Here's a quick video that explains common family questions:



I'll help answer family questions clearly and calmly.

👉 [\[Get Family Questions Answered\]](#)

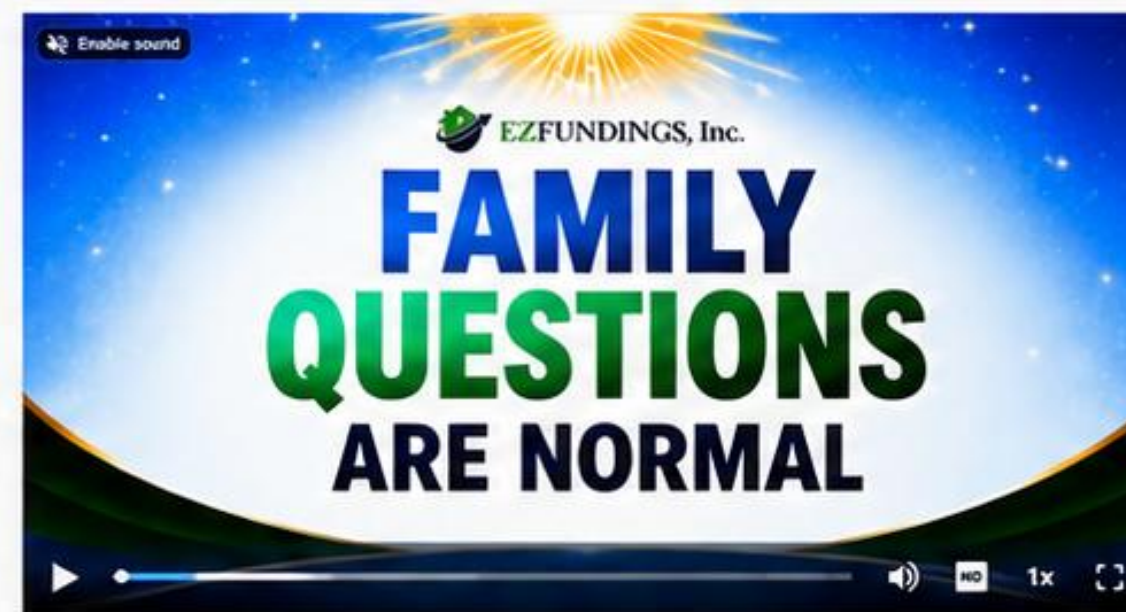


LANDING PAGE PREVIEW

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



Family Questions
Are Normal



Contact Me Now



Secure & Private
Your information
is protected.



Quick & Easy
Takes less than
2 minutes.



No Obligation
Just honest
answers.

EZFUNDINGS INC | NMLS ID #1156892 Copyright 2026 ©

| NMLS ID #1156892 | ITAR LENDER | FAIR HOUSING | NMLS CONTINUING EDUCATION #1156892

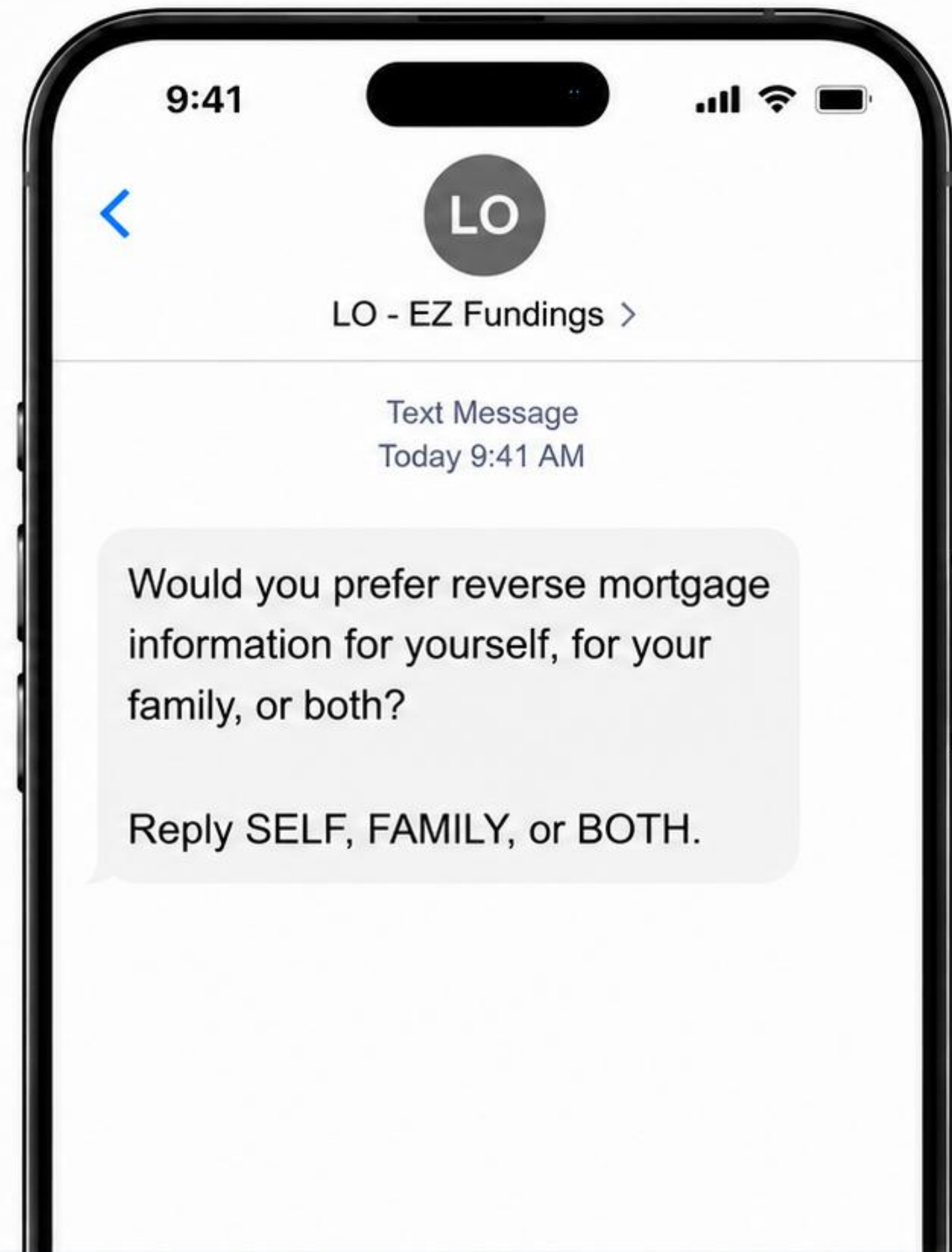
[COMMON STATE LICENSES](#) [PRIVACY POLICY](#) [TERMS & CONDITIONS](#)

This email and any files transmitted with it are confidential and intended solely for the use of the individual or entity to which they are addressed. If you have received this email in error, please notify the sender immediately. Please note any advice or opinions presented in this email are solely those of the author and do not necessarily represent those of the company. Finally, the recipient should check this email and any attachments and even links for the presence of viruses. The company accepts no liability for any damage caused by any virus transmitted by this email.



 DAY 9 – SMS

 SMS





DAY 12

EMAIL #4

CHOOSE YOUR SUPPORT PATH



Subject: How can we support you?



EMAIL PREVIEW (DESKTOP)



[View this email in browser](#)

Subject: How can we support you?
From: EZ Fundings <{{user.email}}>
To: {{contact.email}}



EZFUNDINGS, Inc.

Hi {{contact.first_name}},

Different homeowners and families need different kinds of support.

Choose what would be most helpful:

👉 [Ask a Reverse Mortgage Question]

Get a clear answer to a question about your loan.

👉 [Get Family Questions Answered]

Help family members understand how the reverse mortgage works.

👉 [Review My Home Equity]

Review your current home value and equity position.

👉 [Schedule a Support Call]

Set up a simple check-in with our team.



I'll review the option you choose and follow up with the right support.



LANDING PAGE PREVIEW



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



EZFUNDINGS
HOME LOANS

Choose Your
Support Path



Contact Me Now



Secure & Private
Your information
is protected.



Quick & Easy
Takes less than
2 minutes.



No Obligation
Just honest
answers.



EZFUNDINGS, Inc.

LOAN OFFICER MARKETING AUTOMATION WORKFLOW



TRUSTED PARTNER



CLIENT FOCUSED



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 reverse mortgage support resource.

If you or your family ever have questions about reverse mortgages, home equity, or future planning, we're here to help.

No pressure at all. You can call or text me at **{{user.phone}}**, or check your email for the support link.

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





DAY 15

SMS



SMS



EZFUNDINGS, Inc.



TRUSTED PARTNER



CLIENT FOCUSED



BETTER OUTCOMES



DAY 18

EMAIL #5

PEACE OF MIND **ANGLE**



Subject: A little clarity can bring peace of mind



EMAIL PREVIEW (DESKTOP)



Subject: A little clarity can bring peace of mind
From: {{user.name}} - EZ Fundings <{{user.email}}>
To: {{contact.email}}



Hi Leo Cornelio,

Sometimes people do not need a major review.

They just need a clear answer.

That is why we offer reverse mortgage support for homeowners and families who want to better understand their options.

We can help review:

- How the loan works
- What responsibilities remain
- What family members should understand
- Home equity questions
- Future planning questions
- Who to contact when questions come up



I'll help you get clear answers and a simple next step.

👉 [\[Request a Reverse Mortgage Check-In\]](#)



LANDING PAGE PREVIEW



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



CLARITY BRINGS PEACE OF MIND

[Contact Me Now](#)



Secure & Private
Your information
is protected.



Quick & Easy
Takes less than
2 minutes.



No Obligation
Just honest
answers.



EZFUNDINGS, Inc.

LOAN OFFICER MARKETING AUTOMATION WORKFLOW



TRUSTED PARTNER



CLIENT FOCUSED



BETTER OUTCOMES



DAY 20

LO CHECK-IN

LO CHECK-IN



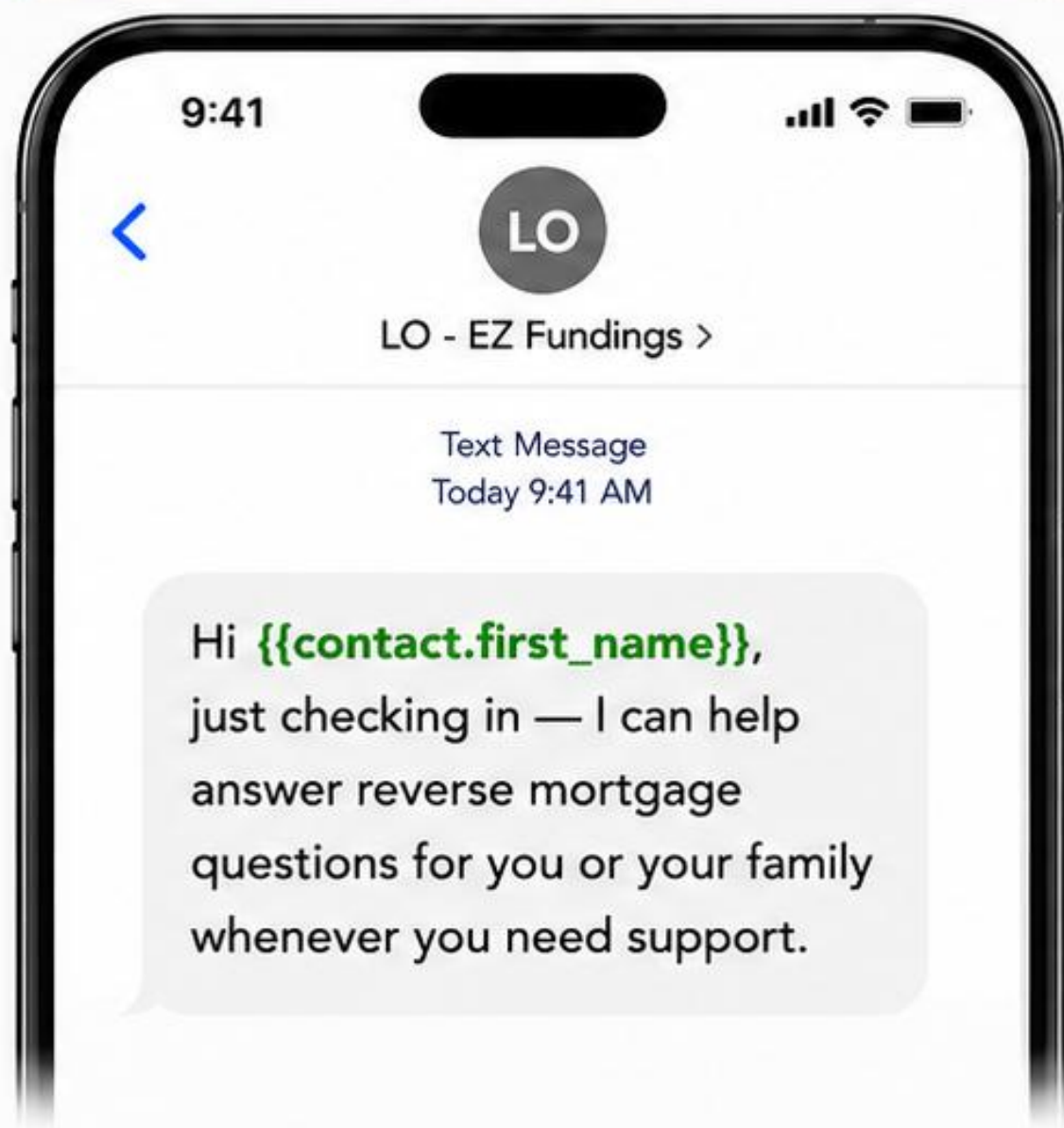
CONDITIONAL ACTION

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



IF NOT ENGAGED —

Manual SMS



IF ENGAGED —

LO Call Task



TASK TITLE:

Call client — engaged with Reverse Mortgage Support



SUGGESTED OPENER:

Hi **{{contact.first_name}}**, this is **{{user.first_name}}** with EZ Fundings. I saw you were looking at reverse mortgage support resources. I'm going to help answer your questions clearly and make sure you and your family have the information you need.

OR



EZFUNDINGS, Inc.



TRUSTED PARTNER



CLIENT FOCUSED



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 or your family ever have questions about reverse mortgages, we're here to help with a simple support call.

No pressure. Just helpful answers when you need them.

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

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





DAY 24

EMAIL #6

KEEP THIS RESOURCE HANDY



Subject: Keep this reverse mortgage resource handy



EMAIL PREVIEW (DESKTOP)



[View this email in browser](#)



Hi {{contact.first_name}},

Even if you do not have questions today,
you may want to keep this resource handy.

If a question comes up later — for you or your family —
we are happy to help.

You can use this link to:

- Ask a question
- Schedule a check-in
- Get family questions answered
- Review home equity
- Request support



I'll help you get clear answers and a simple next step.

👉 [\[Request Reverse Mortgage Support\]](#)



LANDING PAGE PREVIEW



<https://ezfundings.com/keep-this-resource-handy>



Contact Me Now



Secure & Private
Your information
is protected.



Quick & Easy
Takes less than
2 minutes.



No Obligation
Just honest
answers.



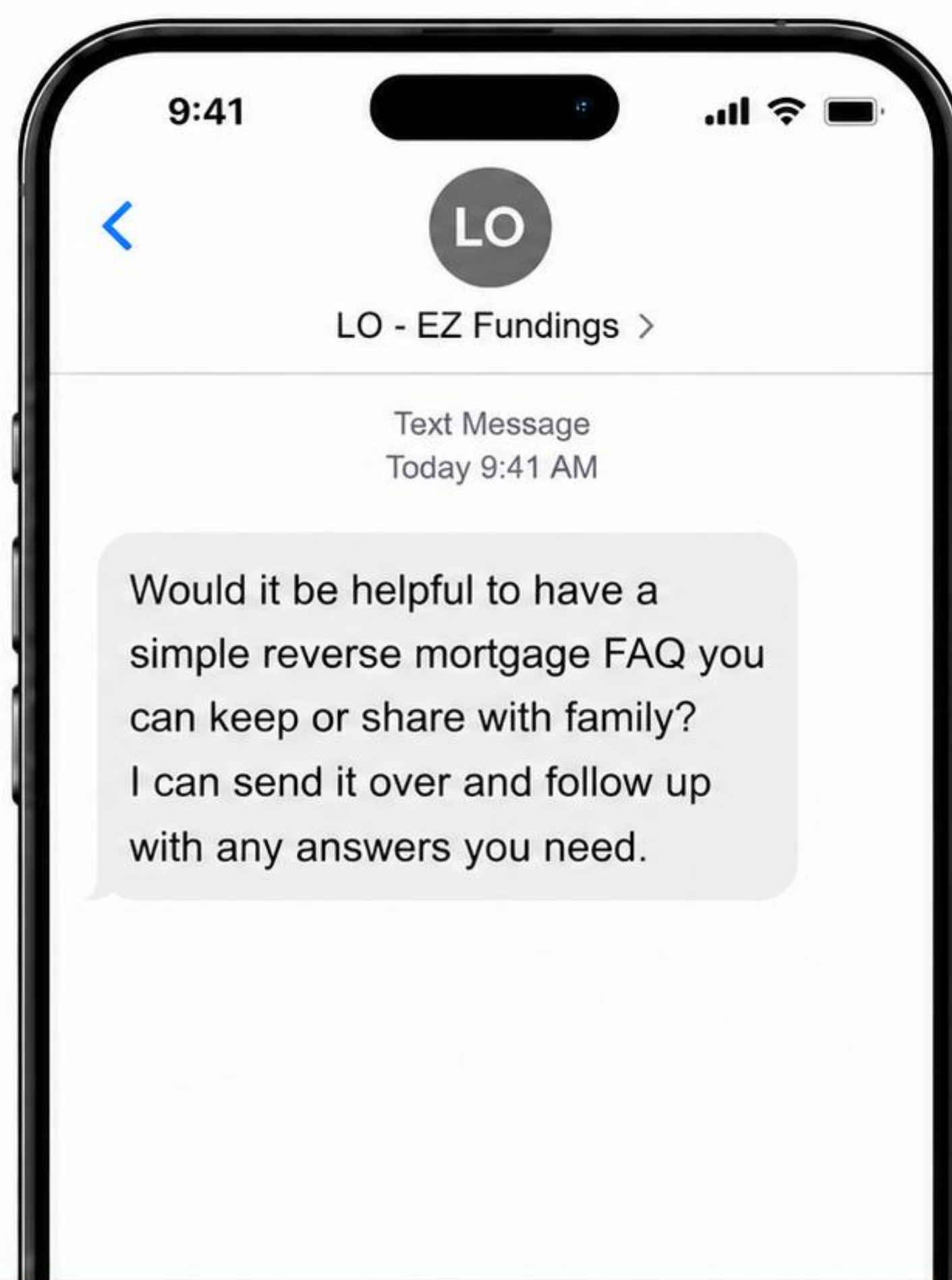


DAY 26

SMS



SMS



EZFUNDINGS, Inc.



TRUSTED PARTNER



CLIENT FOCUSED



BETTER OUTCOMES



DAY 29

FINAL EMAIL

FINAL EMAIL



Subject: We're here if you need us



From: {{user.name}} - EZ Fundings <{{user.email}}>
To: {{contact.email}}
Subject: We're here if you need us



EZFUNDINGS, Inc.

Hi {{contact.first_name}},

Final note for now.

If you or your family ever have questions about reverse mortgages, home equity, or future planning, we're here as a resource.

No pressure.

Just helpful answers and support when you need them.

👉 [\[Request a Reverse Mortgage Check-In\]](#)

Thank you,

{{user.name}}



WHAT THIS EMAIL DOES

Delivers a final, value-packed message that invites the client to get reverse mortgage support and answers.



KEY BENEFITS



Understand how a reverse mortgage works and how it could help your situation.



Review payment options, tax-free cash access, and how funds can be used.



Explore how a reverse mortgage can improve cash flow and financial flexibility.



Get answers to family questions and plan confidently for the future.



No pressure. Just clear, helpful support when you need it.



EZFUNDINGS, Inc.

LOAN OFFICER MARKETING AUTOMATION WORKFLOW



TRUSTED PARTNER



CLIENT FOCUSED



BETTER OUTCOMES

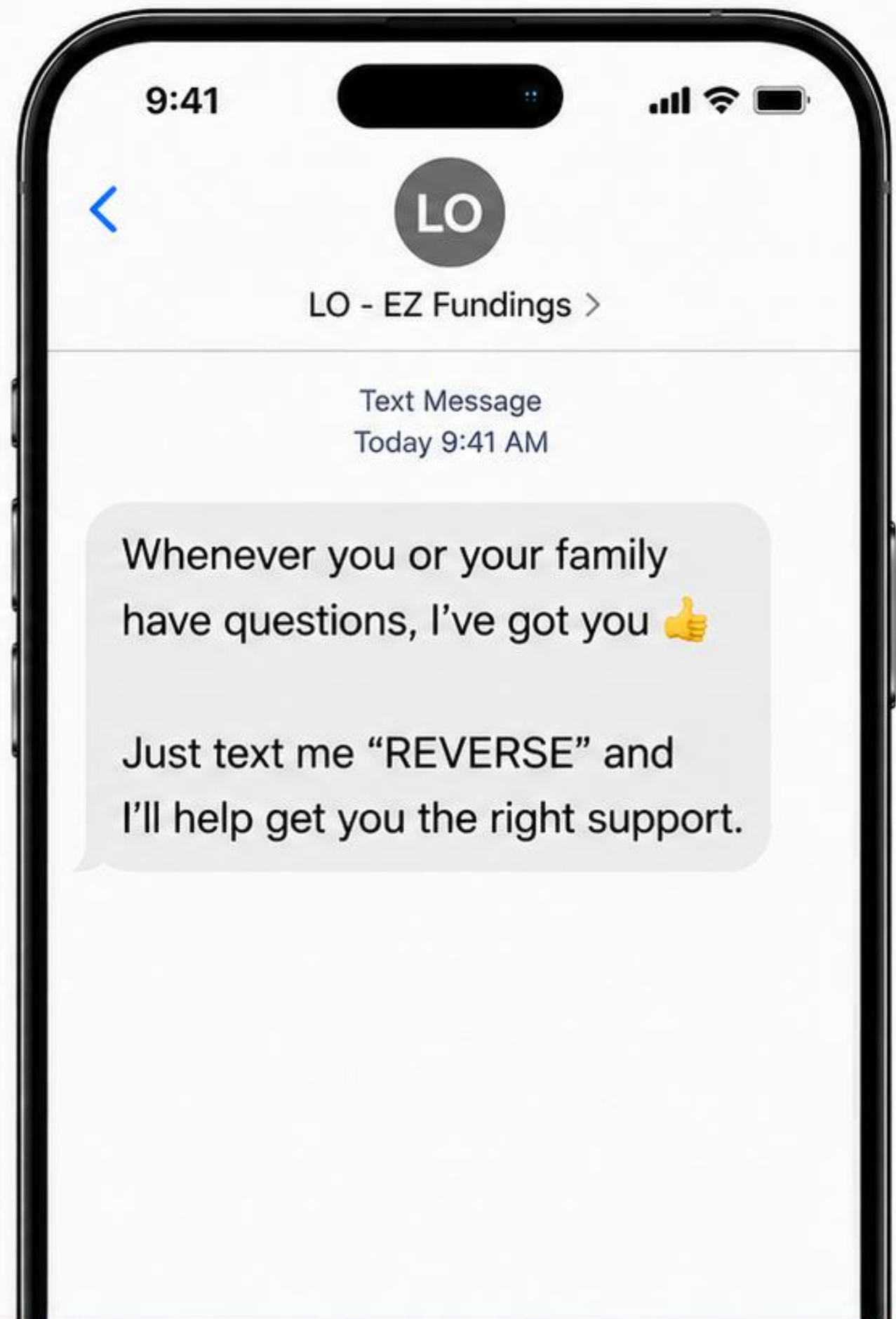


DAY 30

FINAL TEXT



SMS



EZFUNDINGS, Inc.



TRUSTED PARTNER



CLIENT FOCUSED



BETTER OUTCOMES