

HOME VALUE REVIEW

AUTOMATED MARKETING CAMPAIGN

EZ Flow 3.0



CAMPAIGN GOAL

Move homeowners into a focused review of their estimated home value, equity position, loan balance, and mortgage opportunities connected to that equity.

This campaign is intentionally broad because home value curiosity can feed multiple next steps, including:

- Lower payment review
- Cash-out review
- Debt consolidation
- Remove mortgage insurance
- Buy again
- Investment property
- FHA or VA review



PRIMARY CTA

 **[Check My Home Value]**



SECONDARY CTAS



[Review My Home Equity]



[Estimate My Available Equity]



[Run My Mortgage Review]



[See What My Equity Could Do]

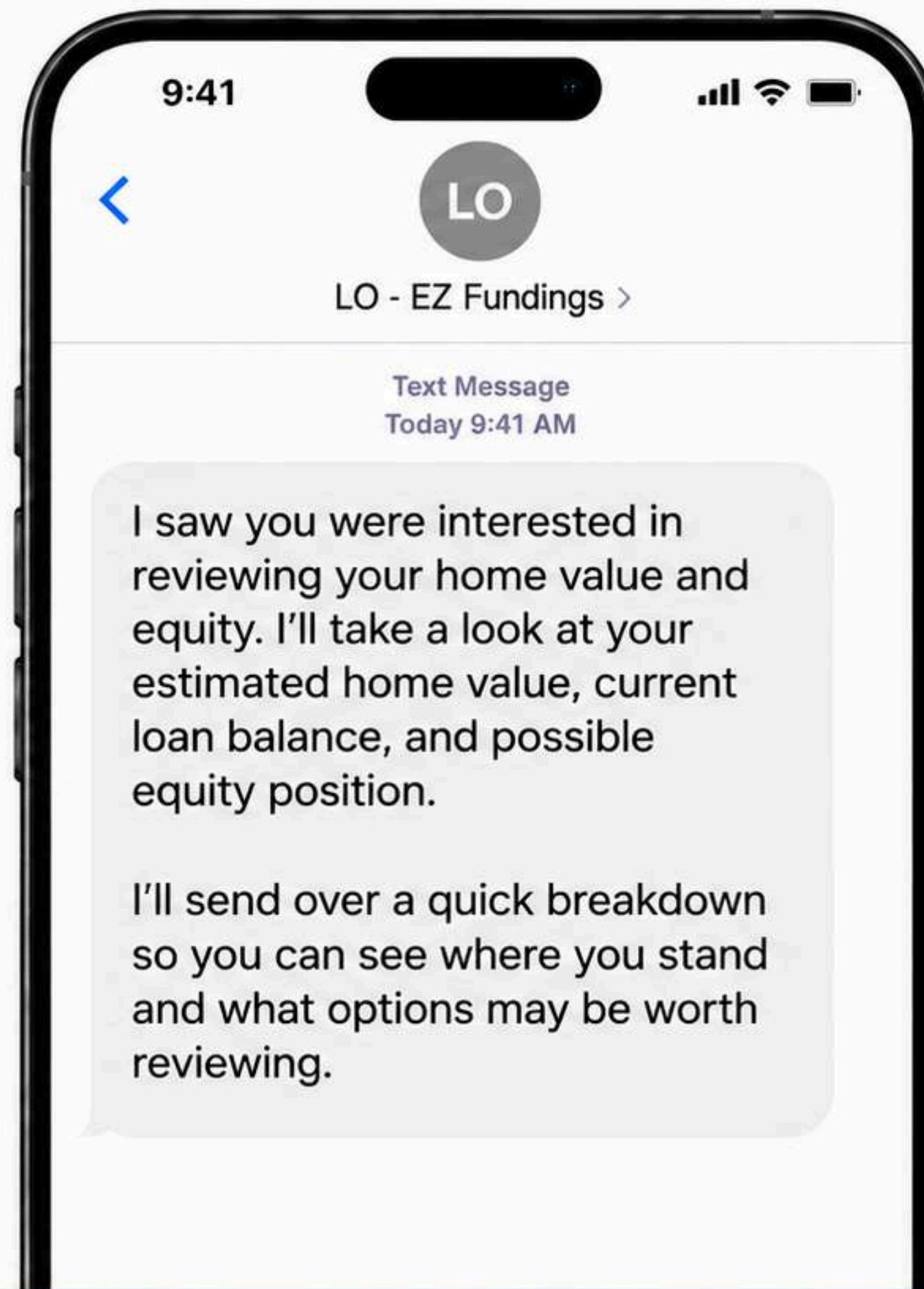


DAY 0 —

LO MANUAL TEXT



SMS



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BETTER OUTCOMES



DAY 1 – EMAIL #1

INTRO + VIDEO



Subject: Your home value may have changed



EMAIL PREVIEW (DESKTOP)

Hi Leo Cornelio,

Since you showed interest in checking your home value, I wanted to send you a simple breakdown.

A lot may have changed since you closed your loan.

Your home value may have increased.

Your loan balance may be lower.

Your equity may have grown.

And your mortgage options may look different today.

A **Home Value Review** helps us estimate where your home may stand today and how that could affect your mortgage options.

We can review:

- Estimated home value
- Current loan balance
- Estimated equity
- Available equity
- Mortgage insurance options
- Cash-out possibilities
- Buying-again options
- Whether your current loan still fits

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



I'll review your home value and equity position and put together a clear snapshot.

Choose where you want to start:

- 👉 [\[Check My Home Value\]](#)
- 👉 [\[Review My Home Equity\]](#)
- 👉 [\[Estimate My Available Equity\]](#)
- 👉 [\[Run My Mortgage Review\]](#)



LANDING PAGE PREVIEW



[Contact Me Now](#)



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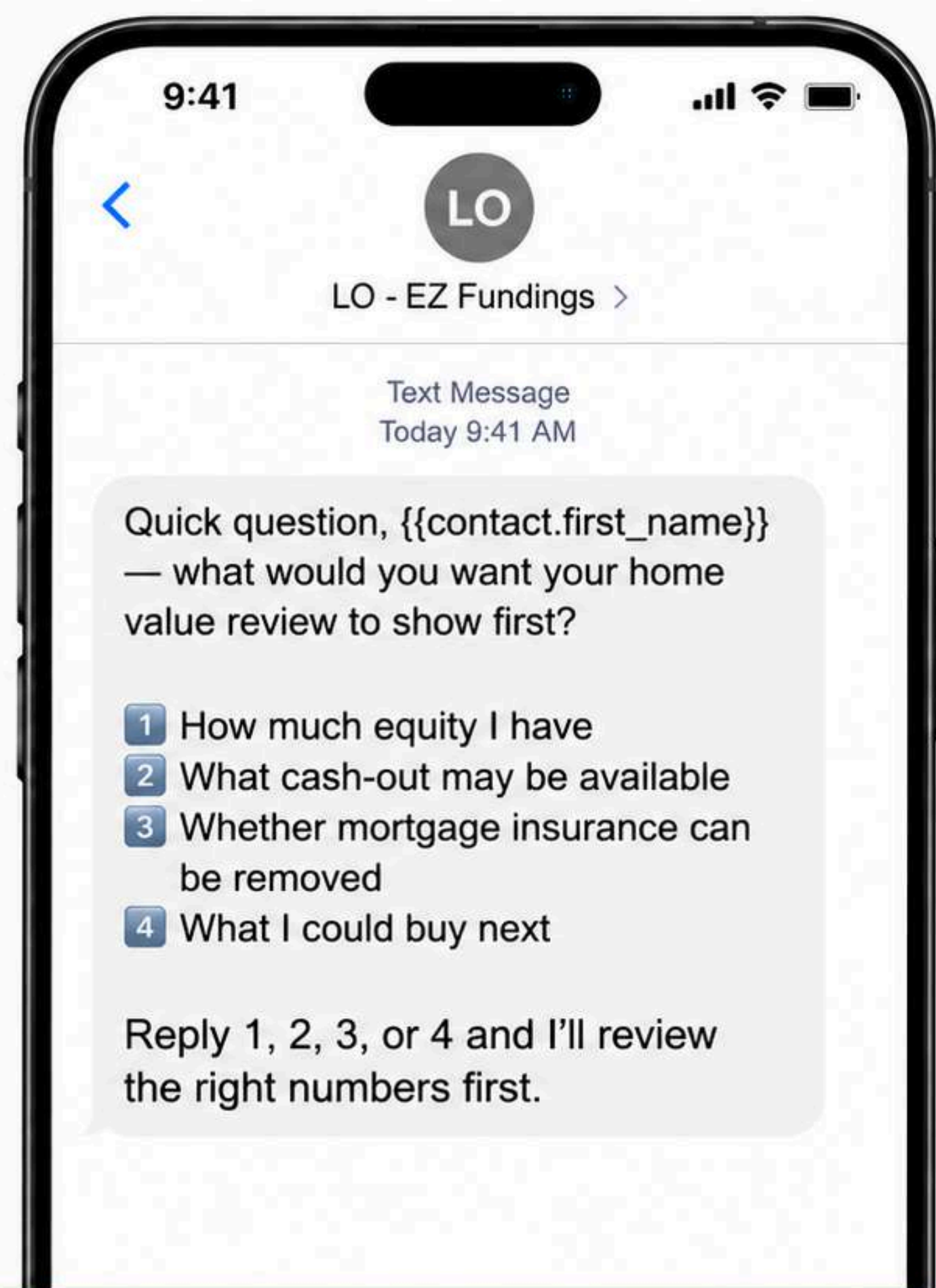




DAY 2 — SMS



SMS



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BETTER OUTCOMES



DAY 4

EMAIL #2

HOME VALUE VS EQUITY EXPLAINED =



Subject: Your equity starts with your home value



EMAIL PREVIEW (DESKTOP)

Hi Leo Cornelio,

Your home value is one of the most important numbers in a mortgage review.

Here's the simple version:

Estimated Home Value
minus
Current Loan Balance
equals
Estimated Equity

That equity may affect several mortgage options.

It may help determine:

- Whether mortgage insurance still makes sense
- Whether cash-out options may be available
- Whether debt consolidation may be possible
- Whether buying again could be realistic
- Whether your current loan still fits your goals

I broke it down simply here:



I'll review your estimated value, current balance, and equity so you have a clear snapshot.

[\[Review My Home Equity\]](#)



LANDING PAGE PREVIEW

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



Home Value -
Loan Balance = Equity



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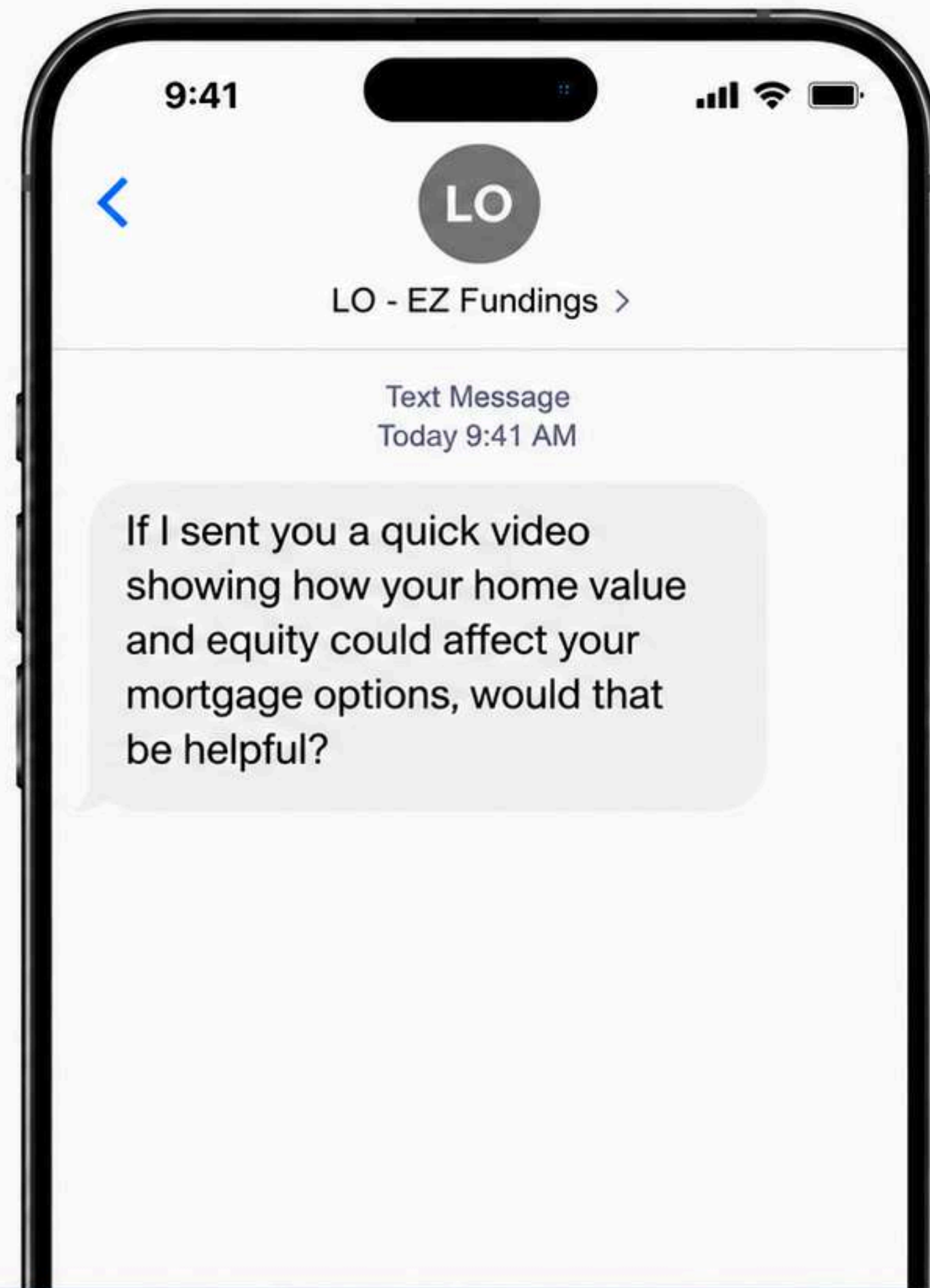
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 DAY 6 – SMS

 SMS



**DAY 8****EMAIL #3**

WHAT EQUITY CAN DO



Subject: Your equity may create more options than you think



EMAIL PREVIEW (DESKTOP)

Hi {{contact.first_name}},

Home equity can create options.

Depending on your current loan, value, balance, and goals, equity may help with:

- Removing mortgage insurance
- Accessing cash-out funds
- Consolidating debt
- Funding home improvements
- Buying another home
- Buying an investment property
- Creating more financial flexibility

That does not mean every option is the right move.

It means the numbers are worth reviewing.

Here's a quick breakdown:



I'll review your home value and equity position and show you which options may be worth looking at first.

[\[See What My Equity Could Do\]](#)



LANDING PAGE PREVIEW

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



What Could Your Equity Do



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DAY 9 – SMS



SMS

DIRECT LO TEXT RESPONSES



If they reply **VALUE**

Perfect, {{contact.first_name}}. I'll start with your estimated home value. I'll review recent value indicators, your current loan balance, and how your home value may affect your mortgage options. Then I'll give you a call with a clear snapshot.



If they reply **EQUITY**

Great, {{contact.first_name}}. I'll focus on your equity position. I'll review your estimated home value, current loan balance, and possible available equity. Then I'll give you a call so you know where you stand.



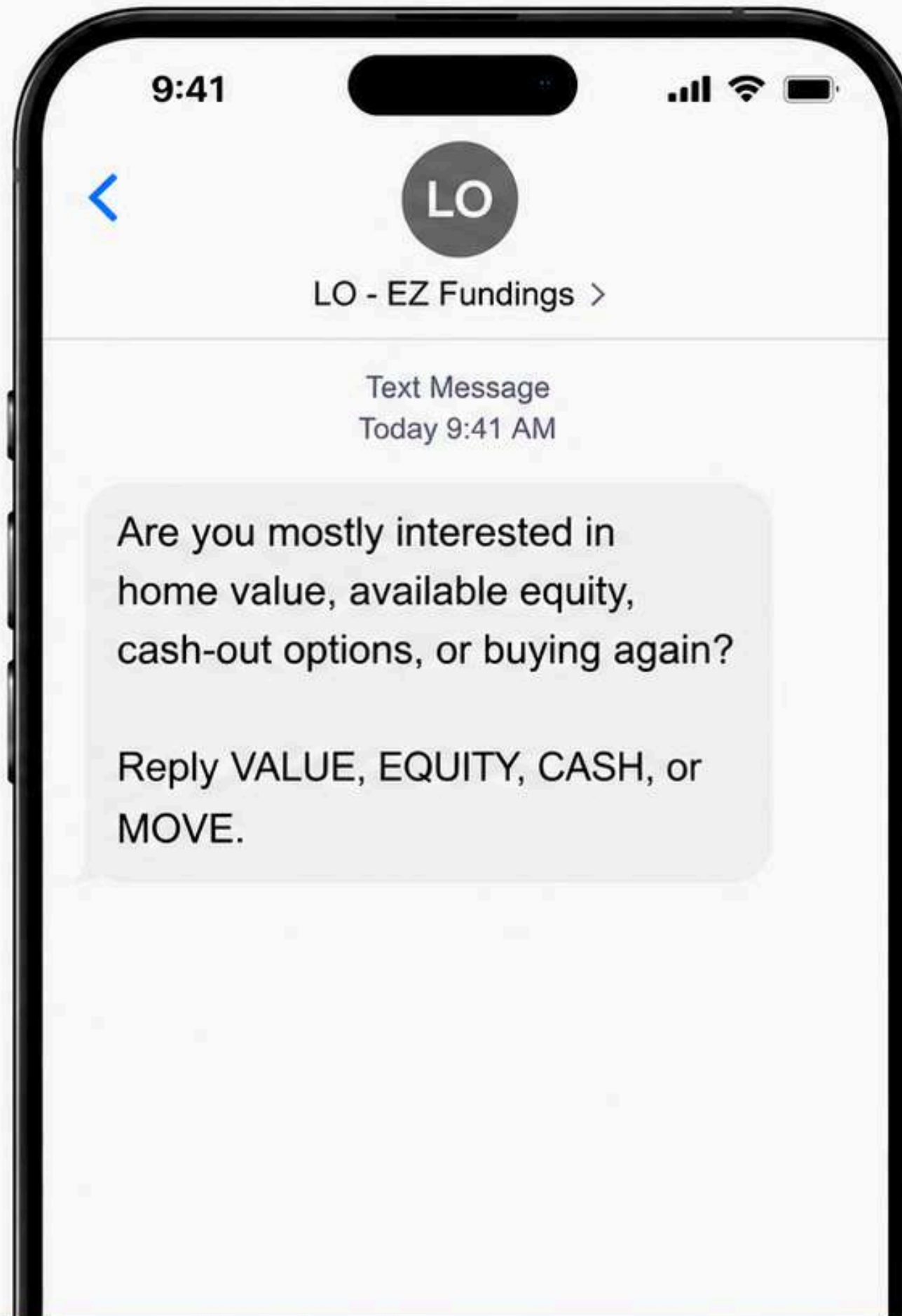
If they reply **CASH**

Got it, {{contact.first_name}}. I'll focus on potential cash-out options. I'll review your value, balance, equity, possible cash-out range, and payment impact. Then I'll give you a call with the options.



If they reply **MOVE**

Absolutely, {{contact.first_name}}. I'll focus on buying again. I'll review your home equity, possible buying power, and next-home payment range. Then I'll give you a call with a simple next-move snapshot.



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BETTER OUTCOMES



DAY 12

EMAIL #4

CHOOSE YOUR HOME VALUE PATH



Subject: What should your home value review focus on?



EMAIL PREVIEW (DESKTOP)

View this email in browser

Subject: What should your home value review focus on?
From: EZ Fundings <{{user.email}}>
To: {{contact.email}}

 **EZFUNDINGS, Inc.**

Hi {{contact.first_name}},

A home value review can answer several different questions.

Choose where you want to start:

- ★ **[What Is My Home Worth?]**
Review your estimated current home value.
- ★ **[How Much Equity Do I Have?]**
Compare your estimated value against your current loan balance.
- ★ **[What Cash-Out May Be Available?]**
Review whether usable equity may be available.
- ★ **[What Could I Buy Next?]**
See whether your current home equity could help with another purchase.



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



LANDING PAGE PREVIEW

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

 **EZFUNDINGS**
HOME LOANS

Choose Your Home Value Path



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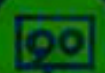
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 **No Obligation**
Just honest answers.

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DAY 14

CONDITIONAL RINGLESS VOICEMAIL #1

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 Home Value Review invitation.

If your home value has changed or your loan balance has gone down, your equity position may be worth reviewing.

There is no obligation. We can simply estimate your value, balance, and equity so you know where you stand.

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

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



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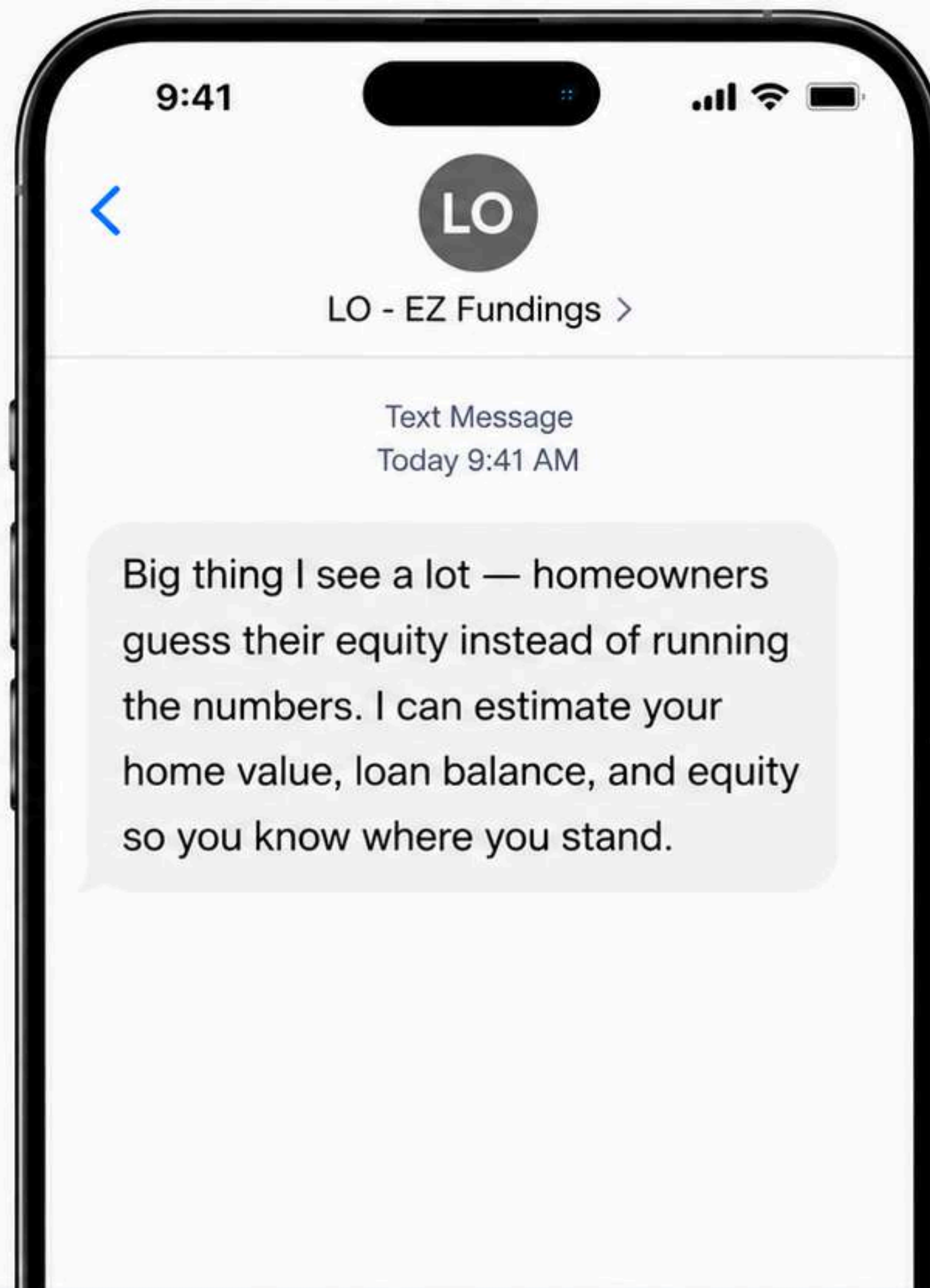
BETTER OUTCOMES



DAY 15 – SMS



SMS



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BETTER OUTCOMES



DAY 18

EMAIL #5

WHY VALUE MATTERS



Subject: Your home value can affect more than you think



EMAIL PREVIEW (DESKTOP)



Subject: Your home value can affect more than you think
From: EZ Fundings <{{user.email}}>
To: {{contact.email}}



Hi Leo Cornelio,

Your home value can affect more than just what your home might sell for.

It can also affect your mortgage options.

A stronger home value may impact:

- Equity position
- Mortgage insurance options
- Cash-out possibilities
- Debt consolidation options
- Buying-again opportunities
- Investment property opportunities

That is why a Home Value Review is a smart first step.



We can look at your estimated value, loan balance, equity, and possible next steps.

[👉 \[Check My Home Value\]](#)



LANDING PAGE PREVIEW



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



Why Home Value Matters



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LOAN OFFICER MARKETING AUTOMATION WORKFLOW



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BETTER OUTCOMES



DAY 20

LO CHECK-IN

LO CHECK-IN

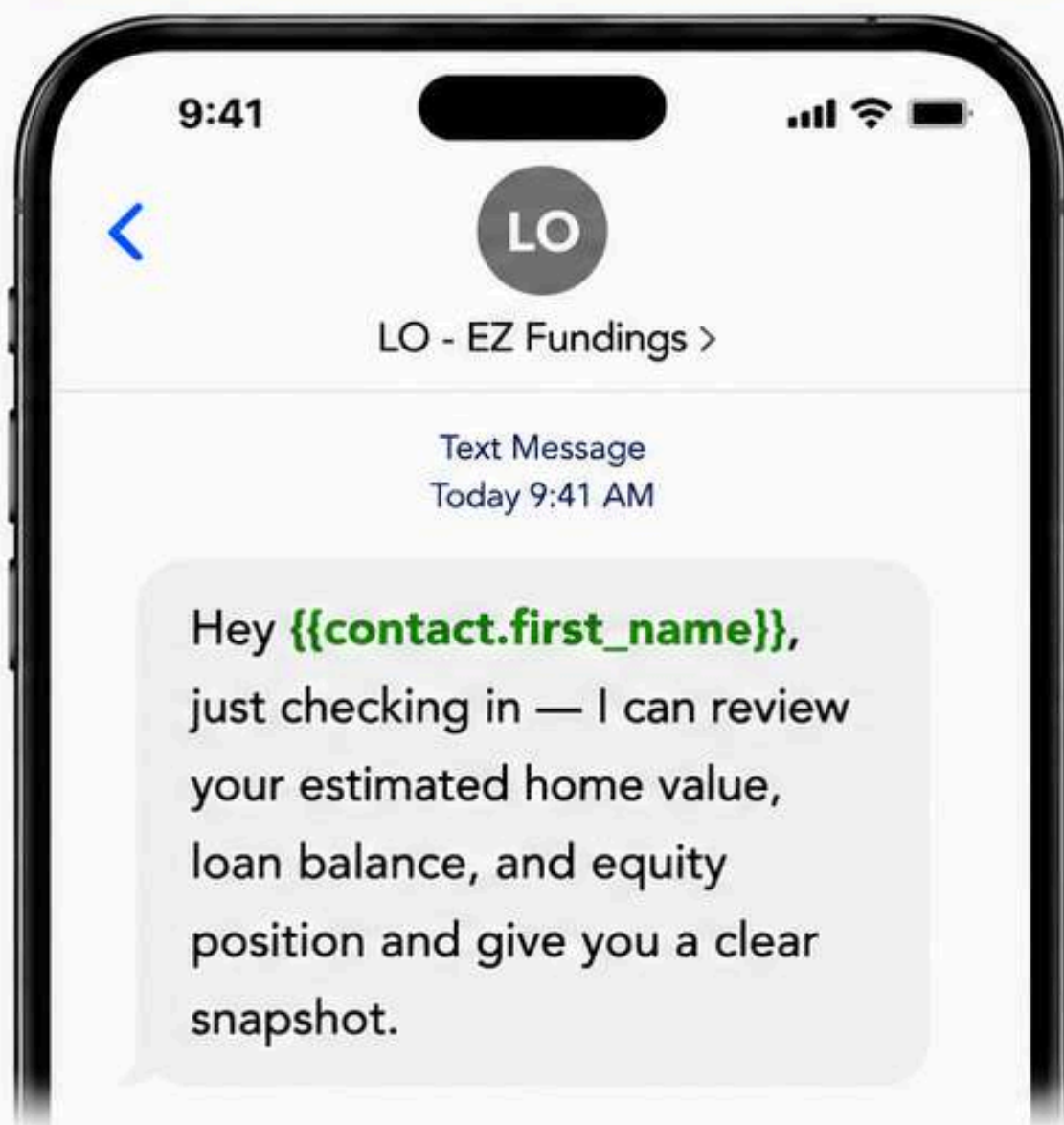


CONDITIONAL ACTION

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



IF NOT ENGAGED —
Manual SMS



IF ENGAGED —
LO Call Task



TASK TITLE:

Call borrower — engaged with Home Value Review



SUGGESTED OPENER:

Hi **{{contact.first_name}}**, this is **{{user.first_name}}** with EZ Fundings. I saw you were checking your home value. I'm going to walk you through your estimated value, current loan balance, equity, and the mortgage options that may be worth reviewing first.

OR



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BETTER OUTCOMES



DAY 22

CONDITIONAL RINGLESS VOICEMAIL #2

CONDITIONAL RINGLESS VOICEMAIL #2



ONLY IF NO ENGAGEMENT

Hi **{{contact.first_name}}**, this is **{{user.name}}** with EZ Fundings.

Just a quick reminder — if you are curious what your home may be worth today, we can run a simple Home Value Review.

No pressure. We'll estimate your value, loan balance, equity, and possible next steps so you know where you stand.

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

HOME VALUE GAME PLAN



Subject: Want a simple home value game plan?



EMAIL PREVIEW (DESKTOP)



[View this email in browser](#)

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



EZFUNDINGS, Inc.

Hi {{contact.first_name}},

If your home value has changed, your mortgage options may have changed too.

A simple Home Value Review can help you understand:

- Estimated current home value
- Current loan balance
- Estimated equity
- Possible available equity
- Whether mortgage insurance should be reviewed
- Whether cash-out, debt consolidation, or buying again may be worth reviewing

No pressure.



Just clarity.

[👉 \[Check My Home Value\]](#)



LANDING PAGE PREVIEW



<https://ezfundings.com/home-value-game-plan>



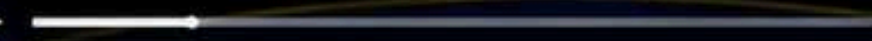
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WANT A HOME VALUE GAME PLAN?



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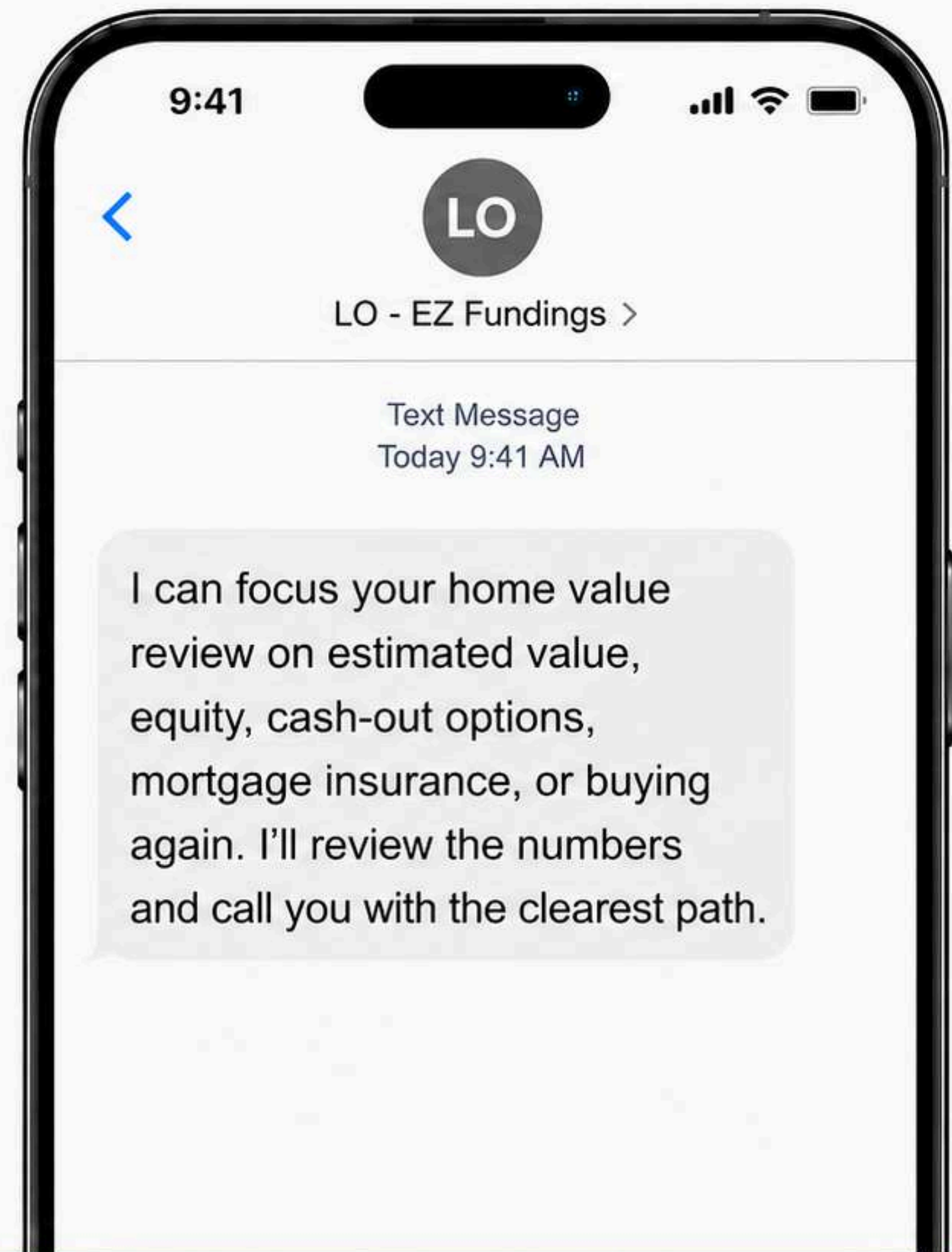
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BETTER OUTCOMES

 DAY 26 **SMS**

 SMS





DAY 29

FINAL EMAIL

FINAL EMAIL



Subject: Want to know where your home stands today?

From: {{user.name}} - EZ Fundings <{{user.email}}>
To: {{contact.email}}
Subject: Want to know where your home stands today?



EZFUNDINGS, Inc.

Hi {{contact.first_name}},

Final note on this.

If your home value has changed since you closed, your equity and mortgage options may have changed too.

We can estimate your current home value, current loan balance, equity position, and possible options.

No pressure.

Just a clear snapshot.

👉 [\[Check My Home Value\]](#)

Thank you,

{{user.name}}



STAY INFORMED

Know your estimated home value and keep track of changes that could impact your options.



UNDERSTAND YOUR EQUITY

See how much equity you may have and what it could mean for your financial goals.



EXPLORE YOUR OPTIONS

Review refinance, cash-out, debt consolidation, or buying-again opportunities.



MAKE CONFIDENT DECISIONS

Get clear insights so you can choose the path that works best for you.



HERE WHEN YOU NEED US

We're ready to answer questions and guide you every step of the way.



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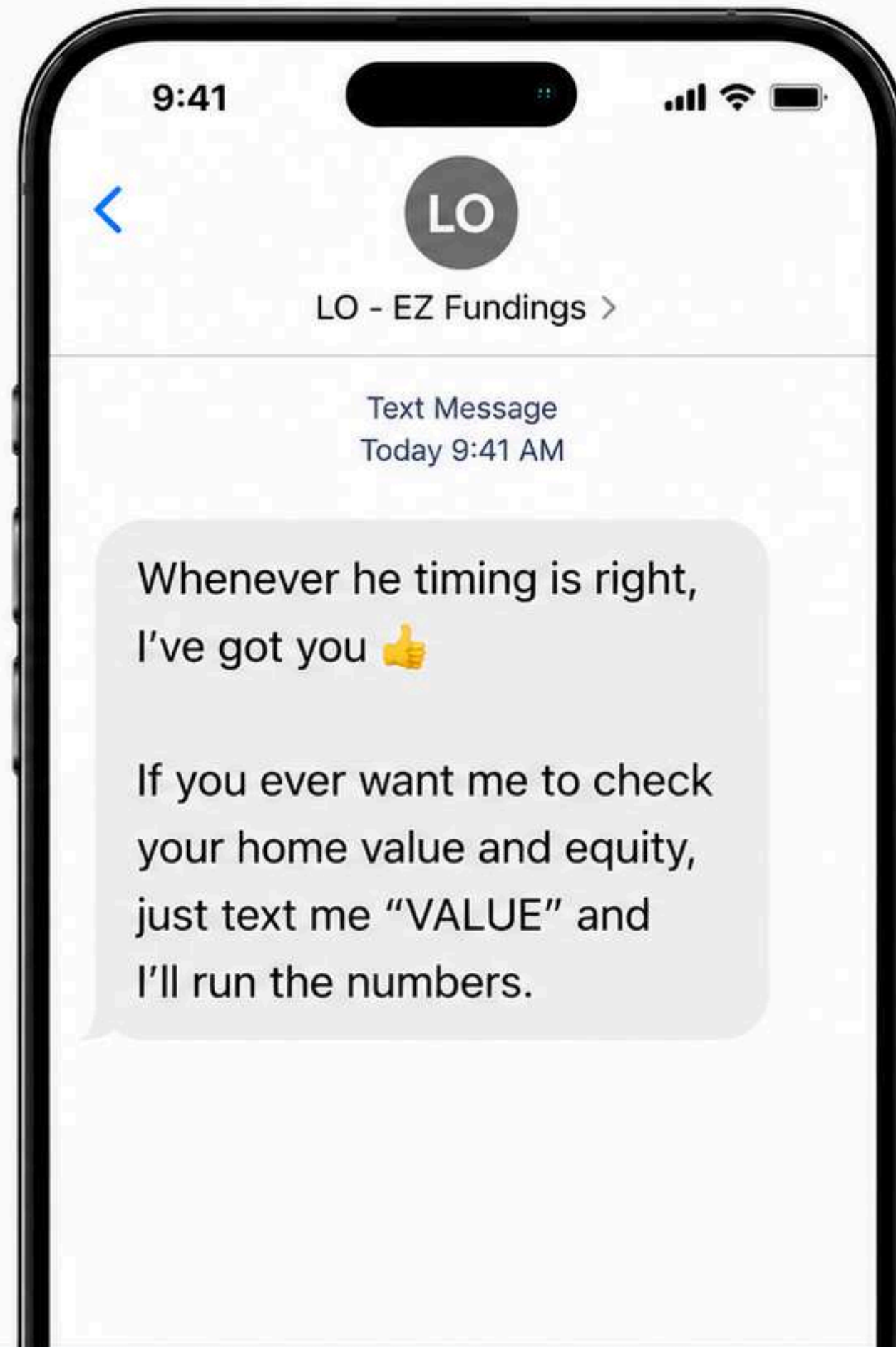


DAY 30

FINAL TEXT



SMS



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BETTER OUTCOMES