

FAMILY REFERRAL

Automated Marketing Campaign

EZ Flow 3.0



CAMPAIGN GOAL

Move past clients into referral conversations by positioning EZ Fundings as a trusted mortgage resource for family members, adult children, parents, siblings, friends, coworkers, and anyone who may need a mortgage review or second opinion.

This campaign is not framed as “**send us referrals.**”

It is framed as helping someone they care about avoid mistakes and get a clear plan.



PRIMARY CTA

 **[Help a Family Member Get Started]**



SECONDARY CTAS



[Help My Child Buy]



[Get a Mortgage Second Opinion]



[Introduce Someone to EZ Fundings]



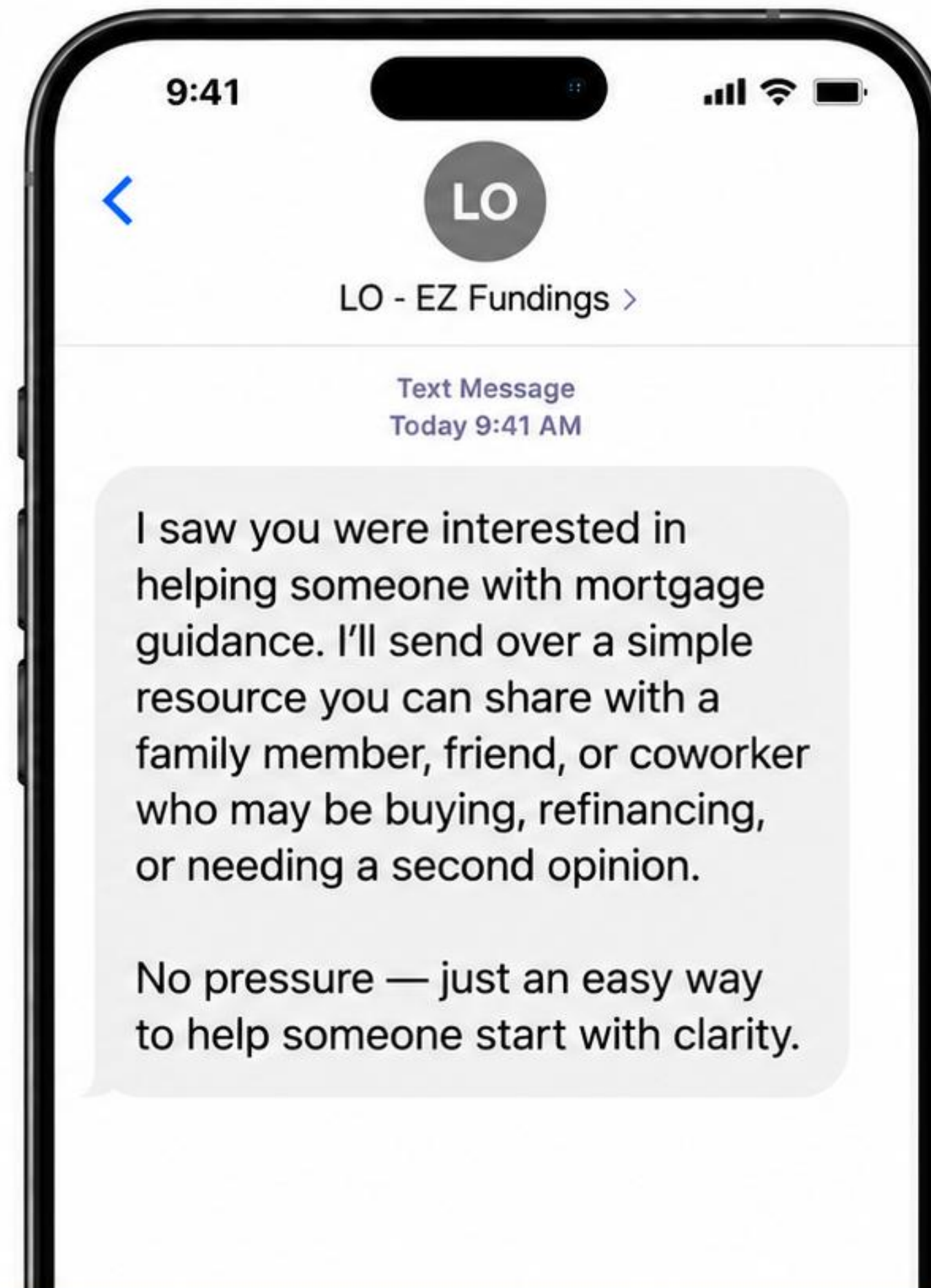
[Send Them a Buying Plan]



DAY 0 — LO MANUAL TEXT



SMS



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TRUSTED PARTNER



CLIENT FOCUSED



BETTER OUTCOMES



DAY 1 – EMAIL #1

INTRO + VIDEO



Subject: Know someone who may need mortgage help?



EMAIL PREVIEW (DESKTOP)



EZFUNDINGS, Inc.

Hi Leo Cornelio,

Since you showed interest in helping someone with mortgage guidance, I wanted to send you a simple resource.

If someone in your family, workplace, or circle of friends is thinking about buying, refinancing, or trying to understand their mortgage options, we would be honored to help.

A quick mortgage conversation can make a big difference before someone makes a major financial decision.

This may be helpful for:

- Adult children buying their first home
- Parents downsizing or relocating
- Siblings or relatives buying again
- Friends who want a second opinion
- Coworkers starting the home buying process
- Anyone unsure where to start

I put together a quick video you can share with someone who may need guidance:



I'll help them get a simple plan and make sure they know their options before making a move.

Choose the path that fits best:

- [\[Help a Family Member Get Started\]](#)
- [\[Help My Child Buy\]](#)
- [\[Get a Mortgage Second Opinion\]](#)
- [\[Introduce Someone to EZ Fundings\]](#)



LANDING PAGE PREVIEW

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

EZFUNDINGS
HOME LOANS

Help Someone You Care About Buy Smarter

Enable sound

HELP SOMEONE YOU CARE ABOUT BUY SMARTER

A quick mortgage conversation can prevent costly mistakes.

1x

[Contact Me Now](#)

Secure & Private
Your information is protected.

Quick & Easy
Takes less than 2 minutes.

No Obligation
Just honest answers.

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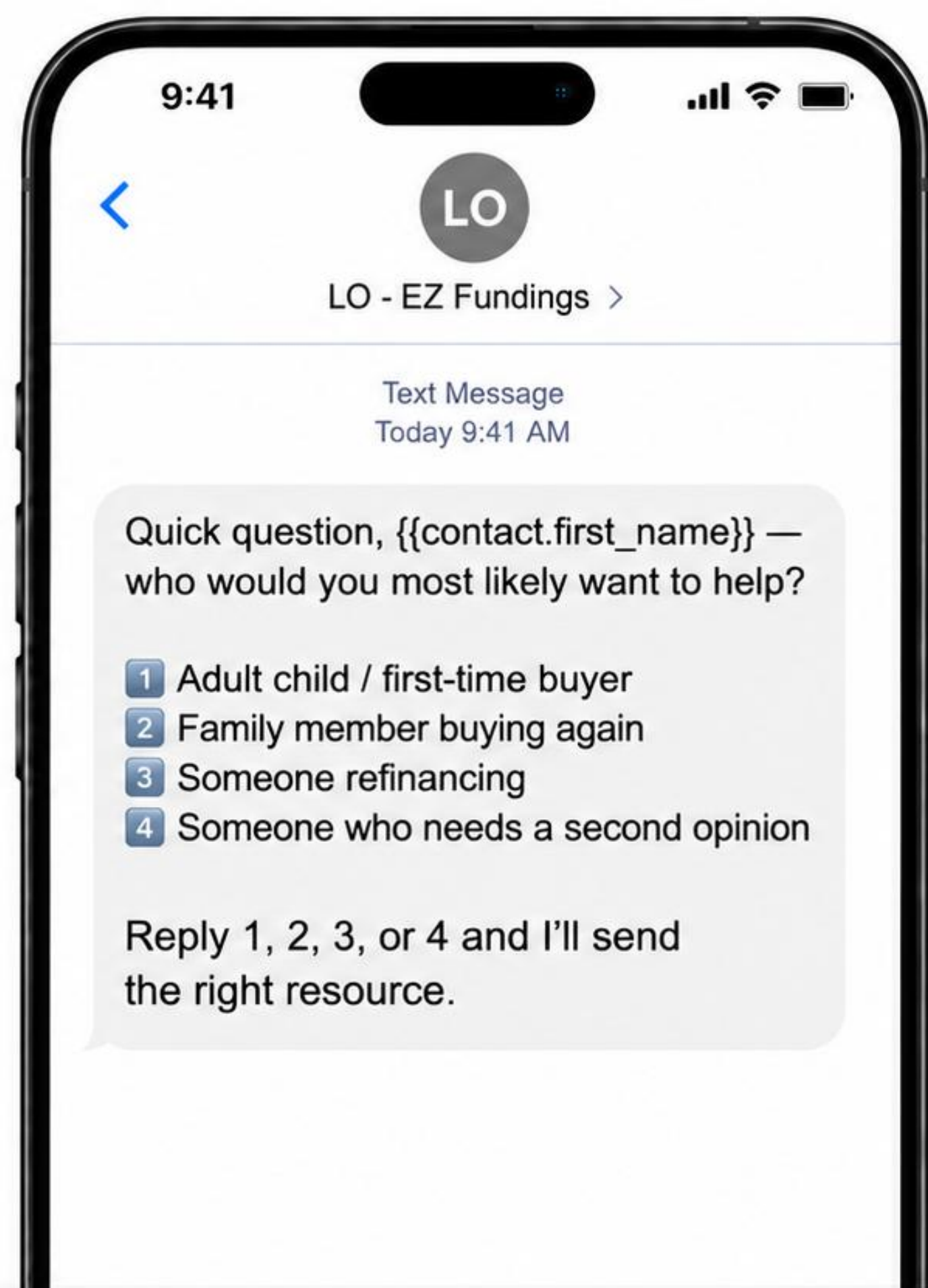
BETTER OUTCOMES



DAY 2 — SMS



SMS



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BETTER OUTCOMES



DAY 4

EMAIL #2

FIRST-TIME BUYER / ADULT CHILD ANGLE



Subject: Help a first-time buyer start smart



EMAIL PREVIEW (DESKTOP)



EZFUNDINGS, Inc.

Hi {{contact.first_name}},

A lot of first-time buyers are overwhelmed.

They may not know:

- How much they can afford
- How much money they need
- What credit score matters
- Whether they need 20% down
- What monthly payment is realistic
- Which loan programs may fit
- What they should avoid before applying

If you have an adult child, family member, friend, or coworker who is thinking about buying, we can help them build a simple game plan before they start shopping.

I broke it down simply here:



I'll help them start with clarity and avoid the common mistakes that cost buyers time, money, and confidence.

[\[Help My Child Buy\]](#)



LANDING PAGE PREVIEW

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



EZFUNDINGS
HOME LOANS

**First-Time Buyers
Need A Plan**



Contact Me Now



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is protected.



Quick & Easy
Takes less than
2 minutes.



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Just honest
answers.

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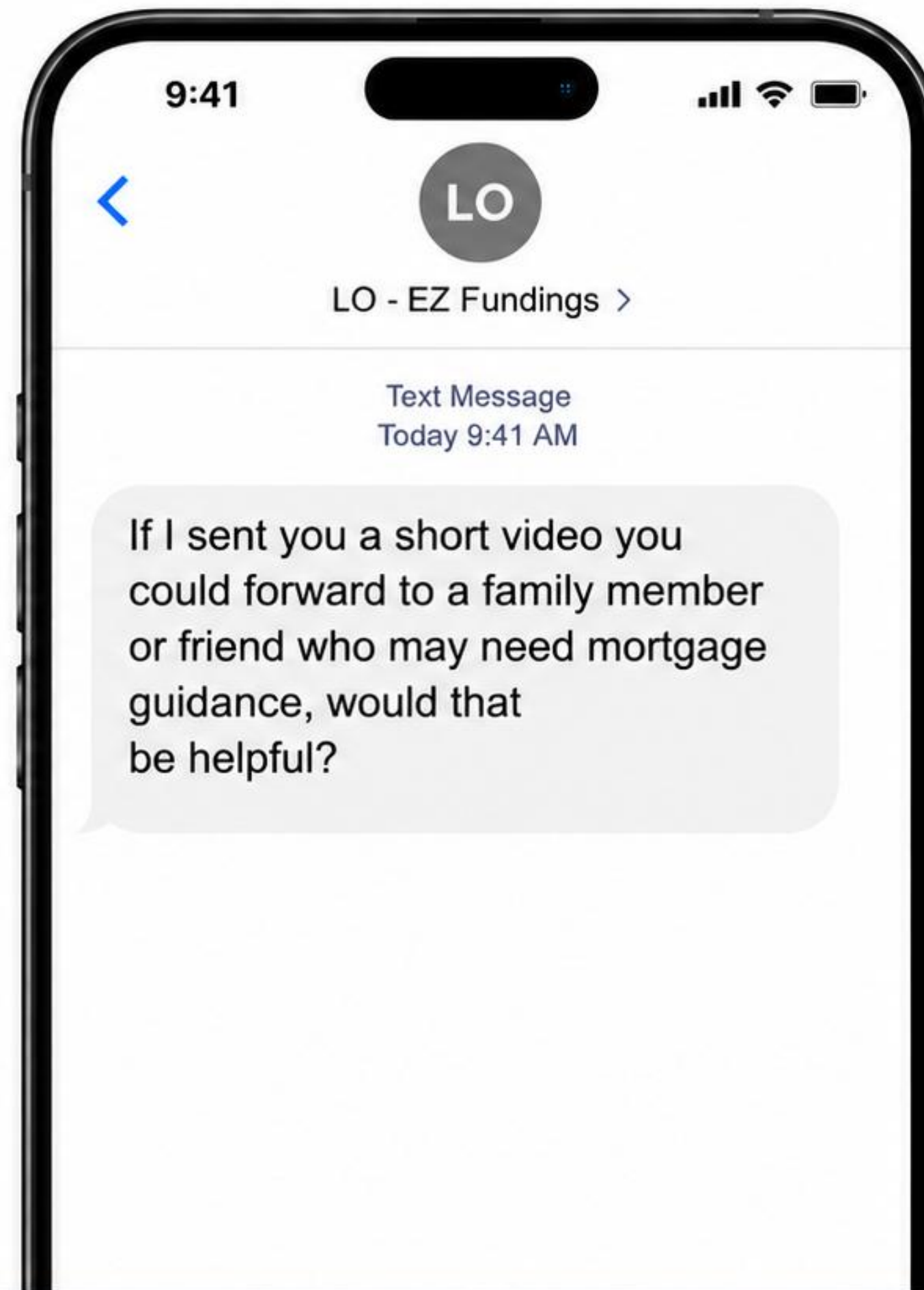
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BETTER OUTCOMES

 DAY 6 – SMS

 SMS





DAY 8

EMAIL #3

SECOND OPINION ANGLE



Subject: A second opinion can save stress



EMAIL PREVIEW (DESKTOP)



EZFUNDINGS, Inc.

Hi {{contact.first_name}},

If someone you know is already talking to a lender, shopping for a home, reviewing a loan estimate, or considering refinance options, a second opinion may be helpful.

A second opinion can help them understand:

- Whether the payment makes sense
- Whether the loan structure fits
- Whether the costs look reasonable
- Whether there may be better options
- What questions to ask before moving forward

This is not about pressure.

It is about helping someone make a confident decision.

Here's a quick video you can share:



I'll help them review the numbers clearly before they commit.

[\[Get a Mortgage Second Opinion\]](#)



LANDING PAGE PREVIEW

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



EZFUNDINGS
HOME LOANS

**Before They Sign...
Get A Second Opinion**



Contact Me Now



Secure & Private
Your information
is protected.



Quick & Easy
Takes less than
2 minutes.



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Just honest
answers.

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BETTER OUTCOMES



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.

9:41



LO

LO - EZ Fundings >

Text Message
Today 9:41 AM

If someone in your circle needed help, would it most likely be a first-time buyer, someone refinancing, someone buying again, or someone who needs a second opinion?

Reply FIRST, REFI, AGAIN, or SECOND.





DAY 12

EMAIL #4

CHOOSE THE FAMILY REFERRAL PATH



Subject: Who could use mortgage help?



EMAIL PREVIEW (DESKTOP)

 **EZFUNDINGS, Inc.**

Hi {{contact.first_name}},

Different people need different types of mortgage help.



Choose the option that fits the person you have in mind:

- 👉 **[First-Time Buyer]**
Help them understand down payment, payment, credit, and pre-approval.
- 👉 **[Refinance Review]**
Help them compare their current loan against available options.
- 👉 **[Second Opinion]**
Help them review a quote, payment, or loan structure before they commit.
- 👉 **[Buying Again]**
Help them understand equity, buying power, and next-home options.

I'll send the right resource and help make the introduction simple.



LANDING PAGE PREVIEW

 **EZFUNDINGS**
HOME LOANS

Who Needs Mortgage Help



[Contact Me Now](#)

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

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

 **No Obligation**
Just honest answers.

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BETTER OUTCOMES



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 family mortgage guidance resource.

If you know someone who may be buying, refinancing, or needing a second opinion, we would be happy to help them with a no-pressure review.

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

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



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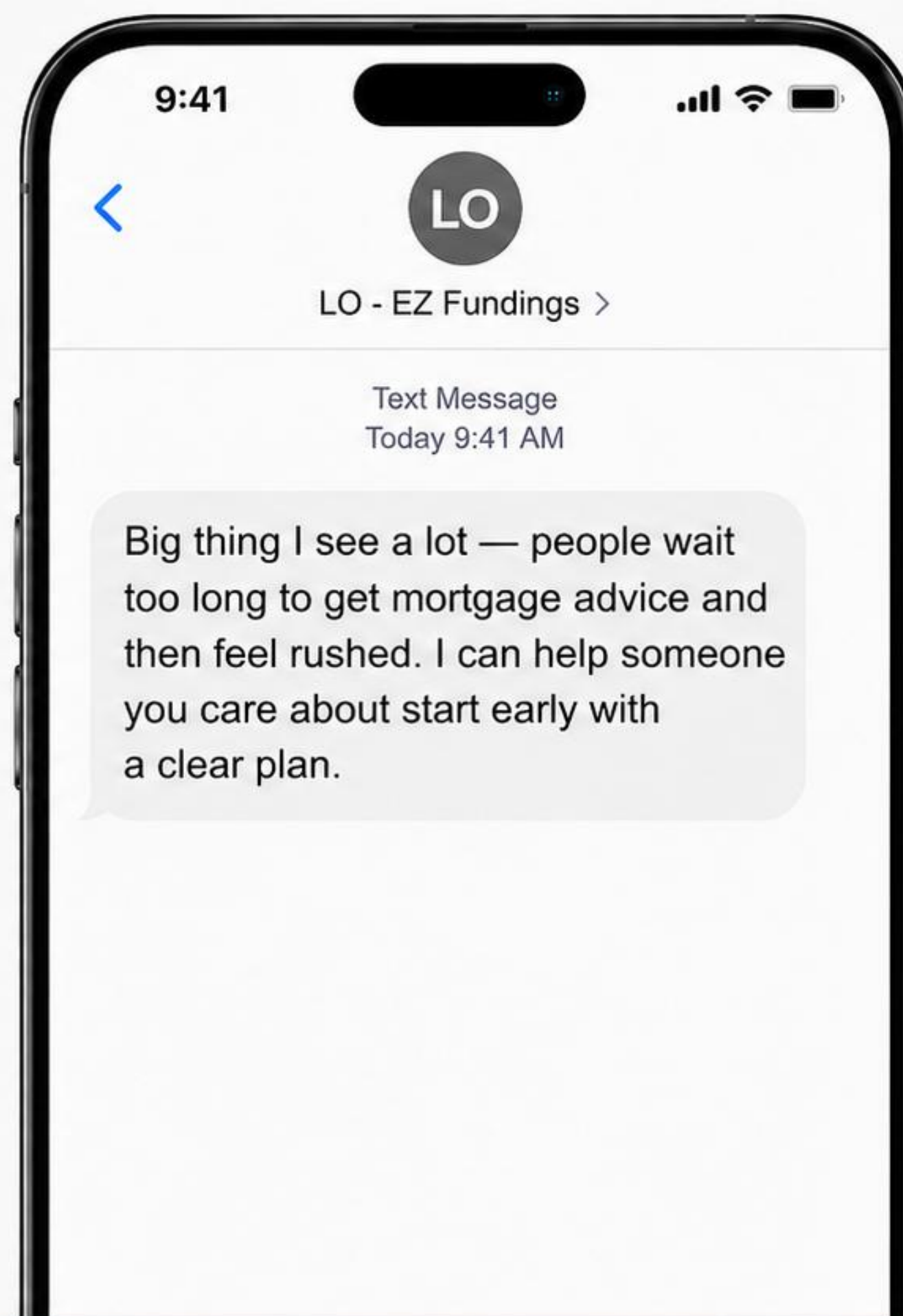
BETTER OUTCOMES



DAY 15 — SMS



SMS



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BETTER OUTCOMES



DAY 18

EMAIL #5

WHY VALUE MATTERS



Subject: Help someone avoid mortgage mistakes



EMAIL PREVIEW (DESKTOP)

Subject: Help someone avoid mortgage mistakes
From: EZ Fundings <{{user.email}}>
To: {{contact.email}}



Hi {{contact.first_name}},

Mortgage mistakes can be expensive.

People sometimes:

- Shop for homes before knowing their numbers
- Focus only on rate and ignore structure
- Underestimate cash needed to close
- Make credit moves before applying
- Choose the wrong payment comfort zone
- Wait too long to get advice
- Commit before getting a second opinion

If someone in your family or circle is thinking about buying or refinancing, we can help them avoid those mistakes.

Here's a simple resource you can share:



I'll help them get clear guidance before they make a move.

[👉 \[Introduce Someone to EZ Fundings\]](#)



LANDING PAGE PREVIEW

https://ezfundings.com/help-them-avoid-mortgage-mistakes



Help Them Avoid
Mortgage Mistakes



Contact Me Now



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Your information
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Quick & Easy
Takes less than
2 minutes.



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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 client — engaged with Family Referral campaign



SUGGESTED OPENER:

Hi **{{contact.first_name}}**, this is **{{user.first_name}}** with EZ Fundings. I saw you were checking out the family mortgage guidance resource. I'll help make the introduction simple and make sure they get the right starting point.

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 someone you care about needs mortgage guidance, we would be happy to help them with a no-pressure review or second opinion.

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

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



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BETTER OUTCOMES

**DAY 24****EMAIL #6**

SIMPLE FAMILY REFERRAL PLAN

**Subject:** Want an easy way to help someone?**EMAIL PREVIEW (DESKTOP)**[View this email in browser](#)

Subject: Want an easy way to help someone?
From: EZ Fundings <{{user.email}}>
To: {{contact.email}}

**EZFUNDINGS, Inc.**

Hi {{contact.first_name}},

If someone you know is thinking about buying, refinancing, or getting a second opinion, you do not have to explain everything yourself.

You can simply send them to us for a no-pressure conversation.

We can help them:

- Understand buying power
- Review monthly payment comfort
- Compare loan options
- Get a second opinion
- Build a simple mortgage plan
- Avoid common mistakes

Here's the easiest place to start:



👉 **[Introduce Someone to EZ Fundings]**

**LANDING PAGE PREVIEW**<https://ezfundings.com/self-employed-review-path>**EZFUNDINGS**
HOME LOANS

Helping is
Simple

[Contact Me Now](#)

Secure & Private
Your information
is protected.



Quick & Easy
Takes less than
2 minutes.



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Just honest
answers.

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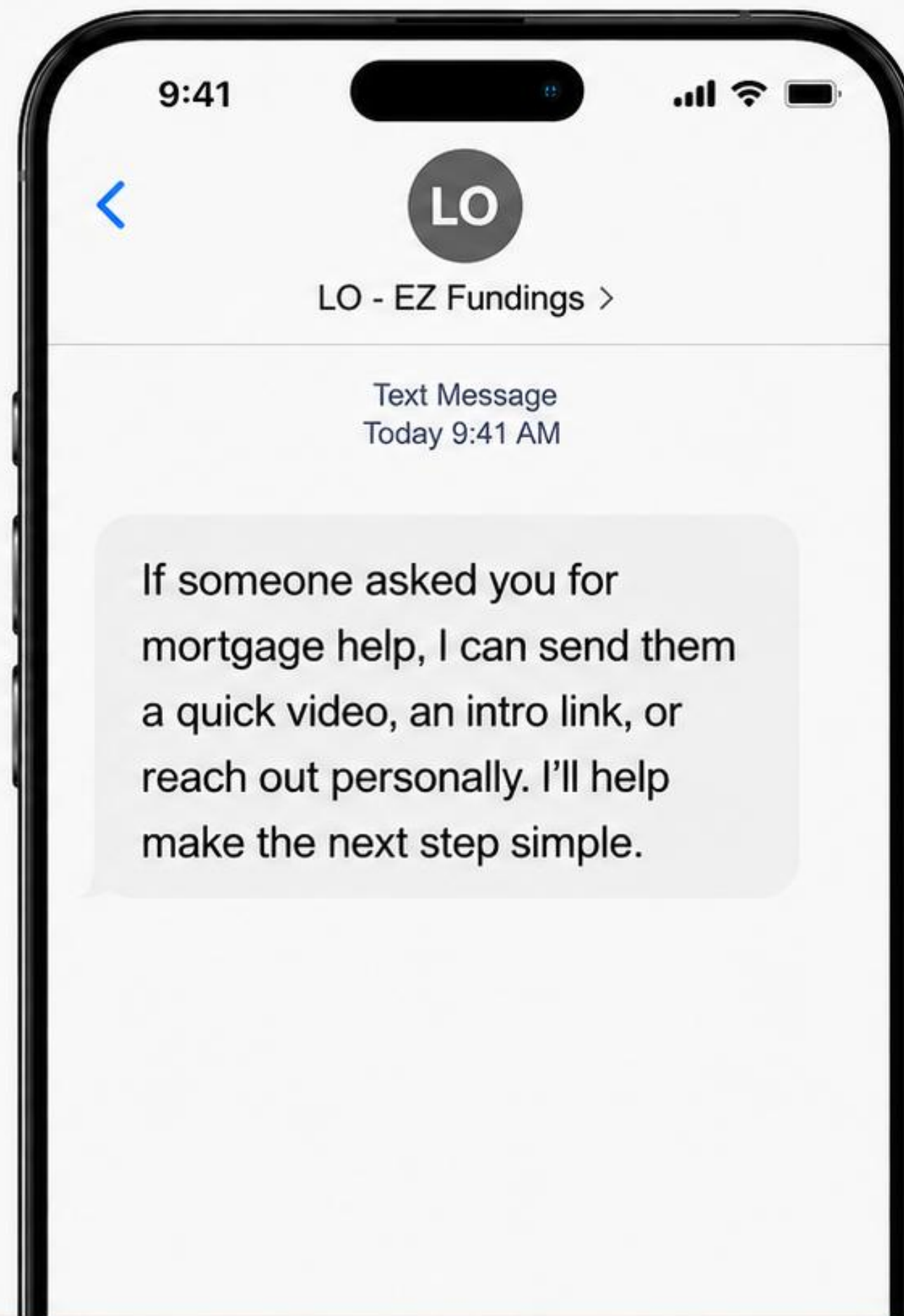


DAY 26

SMS



SMS



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BETTER OUTCOMES



DAY 29

FINAL EMAIL

FINAL EMAIL



Subject: Keep this handy for someone you care about



From: {{user.name}} - EZ Fundings <{{user.email}}>
To: {{contact.email}}
Subject: Keep this handy for someone you care about



Hi {{contact.first_name}},

Final note on this.

If someone in your family, workplace, or circle of friends is thinking about buying, refinancing, or getting mortgage advice, we would be honored to help.

No pressure.

Just guidance, clarity, and a helpful starting point.

👉 [\[Introduce Someone to EZ Fundings\]](#)

Thank you,
{{user.name}}



KNOW YOUR HOME'S VALUE

Get an accurate estimate of your home's current market value.



UNDERSTAND YOUR EQUITY

See how much equity you have and how it can open doors to more options.



EXPLORE YOUR OPTIONS

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



PLAN WITH CONFIDENCE

Make informed decisions with clear numbers and a simple plan forward.



HERE WHEN YOU NEED US

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



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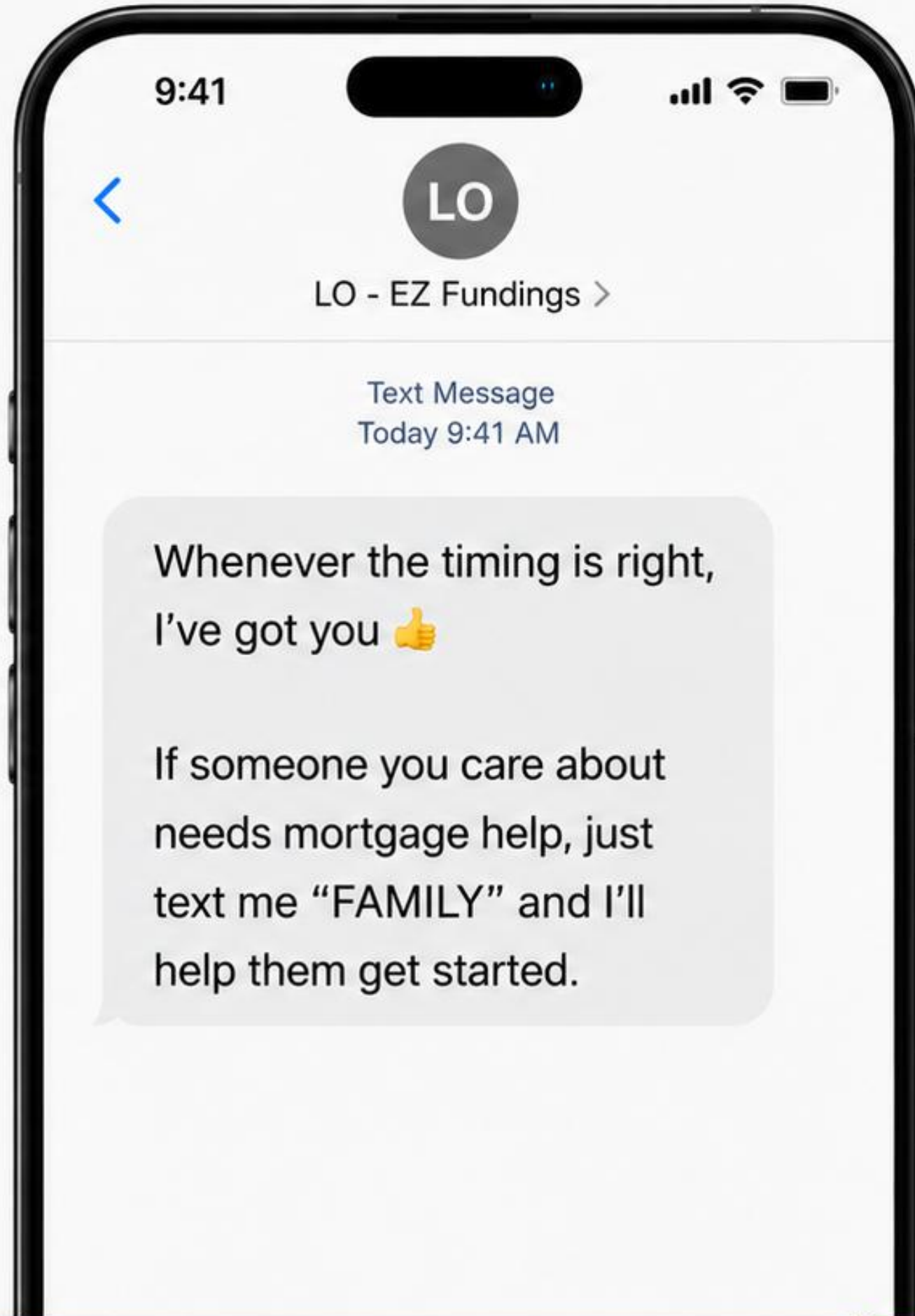


DAY 30

FINAL TEXT



SMS



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BETTER OUTCOMES