

Expert Content Strategy Guide

CI Rate Alert

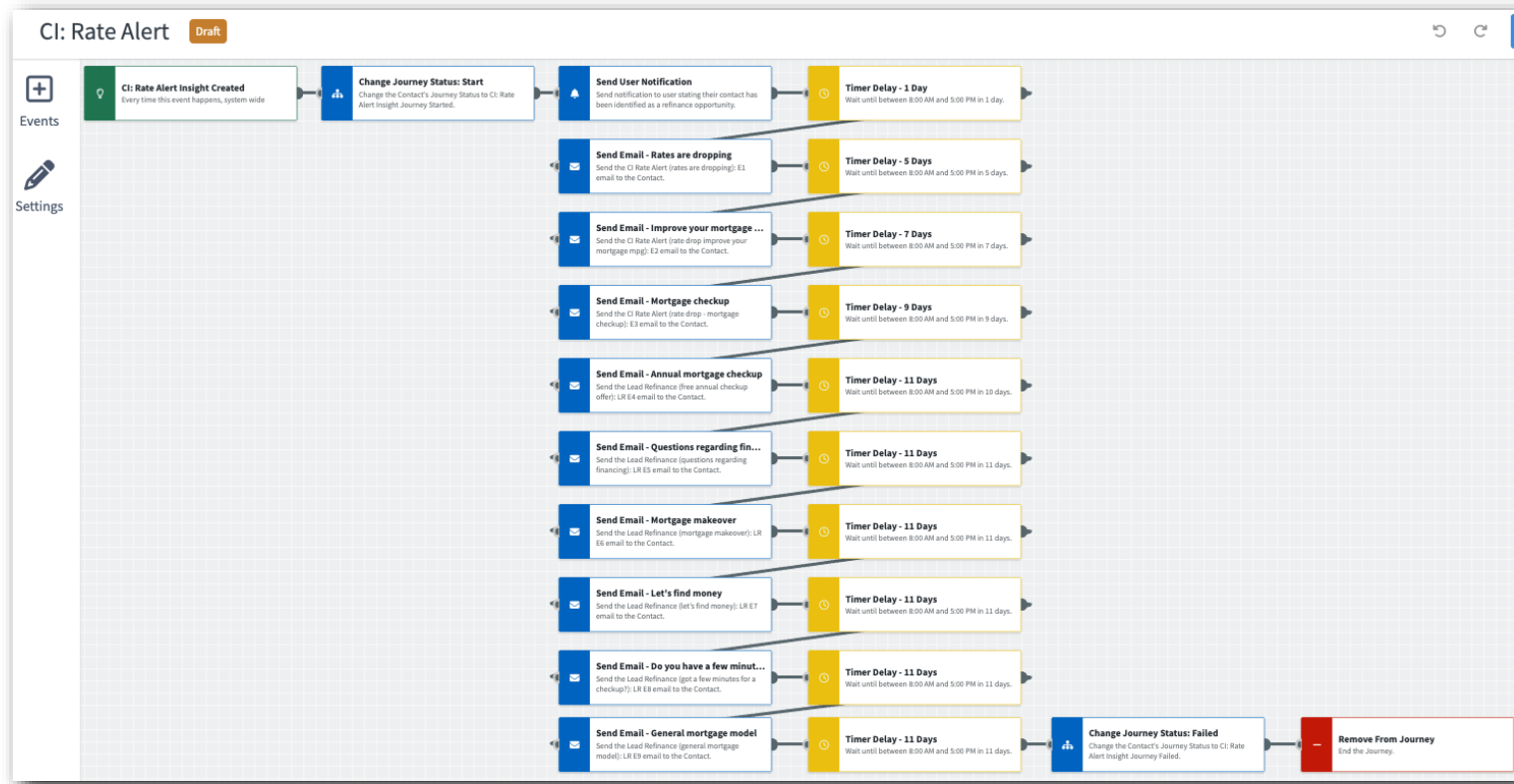


CI: Rate Alert

Email

The CI Rate Alert journey will alert loan officers and customers when there has been an improvement in current mortgage rates that are markedly better than their current note rate to enable refinance opportunities. Series of 9 emails with the first 3 targeting the improvement to the rate specifically, the remaining 6 emails discuss financing options for the customer.

*All communications should be reviewed prior to initiating the journey.



Journey Map Notes:

- Keep emails that work for your organization, swap with custom, or add these emails to your existing campaigns.
- Adjust onramps with organization specific groups and Focused View outcomes.

CI Rate Alert



Hi Aubrey,

As you may be aware, we've seen a drop in mortgage interest rates recently. Mortgage rates fluctuate all the time, but these types of interest rate decreases shouldn't be casually ignored - especially when they can save you money.

Based on your previous home loan transaction with , our records indicate that you may be eligible to lower your mortgage payment enough to make it worth your while.

Don't wait - reach out today for a no obligation consultation to find out if refinancing your current mortgage loan is right for you.

I look forward to speaking with you soon!

Sincerely,



Super Admin Total Expert
NMLS#: 12345
Office: 888-888-8888 | Cell: 888-888-8888
boxmedia@example.com



Total Expert, Inc
132 Main Street
Anytown, MN 12345



 {% include 'BOXO_Branding' %} {{ brand_email_disclaimer }}



Hi Aubrey,

These days, a lot of people are looking to get the best mileage per gallon out of their cars...but what about your house?

With interest rates moving lower recently, this might be a good time for you to find a more economical mortgage model. Reducing your monthly mortgage payment can be a big help managing your overall household budget.

Why wait? Contact me today to see if refinancing your home mortgage loan interest rate would save you money.

Sincerely,



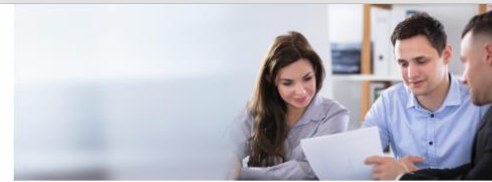
Super Admin Total Expert
NMLS#: 12345
Office: 888-888-8888 | Cell: 888-888-8888
boxmedia@example.com



Total Expert, Inc
132 Main Street
Anytown, MN 12345



 {% include 'BOXO_Branding' %} {{ brand_email_disclaimer }}



Hi Aubrey,

Have you thought about consolidating your debt, or remodeling your current home? With interest rates moving lower recently, now may be a good time to see if can help!

As a licensed mortgage professional, I take pride in helping my customers improve their quality of life and financial outlook - sometimes a home loan refinance with a lower interest rate can unlock opportunities for you.

If you would like to explore your options and see if this is a good fit for you, please reach out at your convenience. I'm here to help.

Sincerely,



Super Admin Total Expert
NMLS#: 12345
Office: 888-888-8888 | Cell: 888-888-8888
boxmedia@example.com



Total Expert, Inc
132 Main Street
Anytown, MN 12345



 {% include 'BOXO_Branding' %} {{ brand_email_disclaimer }}



Hello Aubrey,

Your mortgage and finances can benefit from an annual checkup, to see if you qualify for lower monthly payments. I offer these checkups free of charge. Think of me as a home financing doctor...without the cold stethoscope!

For example, if you're paying mortgage insurance and have been in your home for a while, you may qualify to lower your monthly loan payments by cancelling the insurance.

Another possible diagnosis: a refinance could put your mortgage payments on a diet. Lowering your payments by refinancing could save you a great deal of money over the life of your loan, especially if you shorten your mortgage's term.

I'd love to talk and provide you with a complimentary, routine check-up. Contact me at 888-888-8888 to chat.

Sincerely,



Super Admin Total Expert
NMLS#: 12345
Office: 888-888-8888 | Cell: 888-888-8888
boxmedia@example.com



Total Expert, Inc
132 Main Street
Anytown, MN 12345




 {% include 'BOXO_Branding' %} {{ brand_email_disclaimer }}

Email Subject:

- Great news – rates are dropping
- Improve your mortgage MPG
- Mortgage checkup
- Free annual checkup

CI Rate Alert




Hi Aubrey,

I'm wondering if you have any questions for me regarding your home's financing. Home values, market conditions and your home's equity position can change fast. Do you have the latest information?


I can get you up to speed!

Call me at 888-888-8888 or reply to this email – I'm happy to assist you.

Sincerely,





Super Admin Total Expert
NMLS#: 12345
Office: 888-888-8888 | Cell: 888-888-8888
boxmedia@example.com



Total Expert, Inc
132 Main Street
Anytown, MN 12345

[f](#) [X](#) [in](#) [v](#)

 {% include 'BOXO_Branding' %} {{ brand_email_disclaimer }}




Hello Aubrey,

While your mortgage's term and payments may be looking good to you, it never hurts to see if a "makeover" could make it better.


A review of your home's current equity position (what you owe vs what your home is worth), should be done on a regular basis.

What are your short and long-term plans? Does your current home's financing complement those plans? I'm here to help you explore these questions. We can review your current mortgage and find out if there are opportunities you may want to consider.

Sincerely,





Super Admin Total Expert
NMLS#: 12345
Office: 888-888-8888 | Cell: 888-888-8888
boxmedia@example.com



Total Expert, Inc
132 Main Street
Anytown, MN 12345

[f](#) [X](#) [in](#) [v](#)

 {% include 'BOXO_Branding' %} {{ brand_email_disclaimer }}



Hi Aubrey,

Have you ever found some money in the pocket of your clothing?

That's usually a day-brightener - no matter what you find.


Your home's financing may provide you with a similar, although much bigger surprise, since property values have made a lot of progress in recent years. You may be surprised to find you have more equity in your home than you thought.

It's worth a few minutes of your time - at no cost or obligation - to take a closer look at your home's current value, available equity, and more. Refinancing may offer you ways to save money every month, and during the life of your mortgage.


You may have options available you didn't realize you had.

Let's dig in and find out!

Sincerely,





Super Admin Total Expert
NMLS#: 12345
Office: 888-888-8888 | Cell: 888-888-8888
boxmedia@example.com



Total Expert, Inc
132 Main Street
Anytown, MN 12345

[f](#) [X](#) [in](#) [v](#)

 {% include 'BOXO_Branding' %} {{ brand_email_disclaimer }}




Hello Aubrey,

If you've been wondering about debt consolidation, dreaming of a vacation property or second home, or remodeling your current home, I can provide some valuable information in just a couple of minutes.


Refinancing may be an option, but there may be others to consider.

One of my responsibilities to you is to help you explore options to improve your quality of life and financial outlook, too. Call or reply to this email – I'm here to help!

Sincerely,




Super Admin Total Expert
NMLS#: 12345
Office: 888-888-8888 | Cell: 888-888-8888
boxmedia@example.com



Total Expert, Inc
132 Main Street
Anytown, MN 12345


[f](#) [X](#) [in](#) [v](#)

 {% include 'BOXO_Branding' %} {{ brand_email_disclaimer }}

Email Subject:

- Questions regarding financing
- Mortgage Makeover
- Let's find money
- Do you have a few minutes?

CI Rate Alert




Hello Aubrey,

These days, a lot of people are looking to get the best mileage out of their automobiles...but what about your housing dollars?


There may be a newer, more economical mortgage model out there for you. Now's the time to find out where you stand and how your equity position fits into your plans for the next three years.

Call or reply to this email – I'm happy to assist you!


Sincerely,




Super Admin Total Expert
NMLS#: 12345
Office: 888-888-8888 | Cell: 888-888-8888
boxmedia@example.com



Total Expert, Inc
122 Main Street
Anytown, MN 12345



 `{% include 'BOXO_Branding' %} {{ brand_email_disclaimer }}`

Email Subject:

- General mortgage model