

Expert Content Strategy Guide

Post Close Home Purchase Anniversary

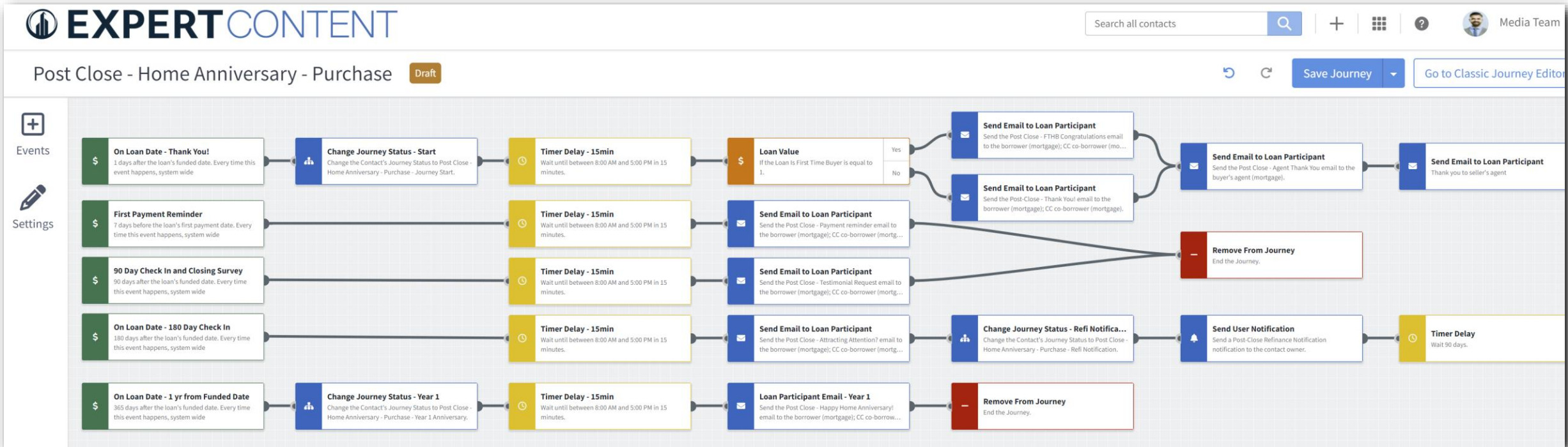


Post Close Purchase Anniversary

Emails, user notifications

Borrower participants will receive a thank you once a purchase loan is funded. It sends the borrowers an additional 4 emails over the course of one year with touchpoints at 1, 3, 6, and 12 months. A separate thank you email for first-time homebuyers and the agents, a 6-month check-in reminder for the contact owner to review for refinancing opportunities, make this campaign easily configured to elevate your organization's post-close experience. Further customize the campaign with integrations like gifting services.

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



Journey Map Notes:

- Co-borrower is cc'd on all borrower emails in this campaign.
- Additional yearly anniversary emails can easily be added should it align with your strategy.

Post Close Purchase Anniversary



Congratulations Teddy,

You're in your first home! I know that you're getting settled in, but I did not want to let another day go by without thanking you for your business. I enjoyed working with you, and am both honored and humbled that you chose me as your financing partner!

Our relationship does not end here, so please feel free to reach out at any time. I'm here to help during the life of your loan and with any future financing needs. You can always contact me at (888) 888-8888 or reply to this email. I'll be happy to answer any questions you may have.

Best,

Media Team



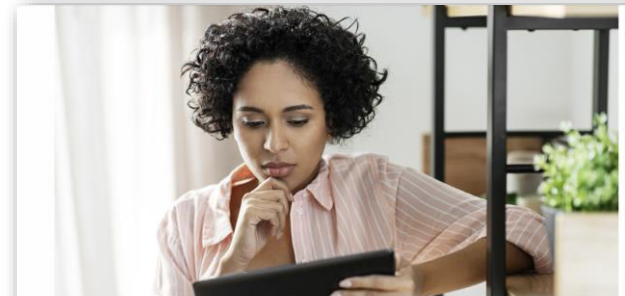
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Best,

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Hi Teddy,

We wanted to remind you about your first payment coming up. It's not unusual that your payment will come due before you receive a statement or anything in the mail. There's so much paper and signing at a closing, some people forget that they were given payment coupons to use for this very reason.

Getting a new home and moving is a busy time and we want to make sure your payment doesn't get overlooked. If you have any questions, please let us know.

Sincerely,

Media Team

Email Names:

- Post Close - Thank You!
- Post Close - FTHB Congrats!
- Post Close - Payment Reminder

Post Close Purchase Anniversary



Hi Teddy,

I'm not sure if you shared with anyone how we worked together, but if you thought it was a positive experience, I would truly appreciate you taking just a few minutes to review my performance. I'd like to share your insight with our future clients.

It's easy and there are options to fit everyone's review style:

- Reply to this email with a few thoughts.
- Give me a call and I can take down your comments.
- Send me a short testimonial video (60 seconds or less) for my social media platforms.
- Click below and go directly to my post-close survey.

Previous clients have touched on the process, communication, resources, and their experience with me directly.

Thank you in advance!



Hi Teddy,

It's pretty common for people who have just gotten a new mortgage to get all kinds of solicitations from different types of companies. Be sure to read the fine print! A lot of these solicitations are generated by the recording of your closing documents. It's best to deal with companies and professionals you know whenever possible.

Be especially leery of programs that claim to help you pay your mortgage off sooner. Give us a call if you have questions on mortgage acceleration programs or other offers - we're here to help!

Regards,
Media Team



Congratulations Teddy,

You've been in your new home for a year - happy home anniversary!

We wanted to check in and find out how you're doing and find out what's new. Do you have any questions? We're still here to help - even though your loan is closed. It's a good idea to check in periodically to review your home's value, how much equity you have and review your goals.

We'd love to hear how homeownership is going for you!

Sincerely,
Media Team

Email Names:

- Post Close - Testimonial Request
- Post Close - Attracting Attention?
- Post Close - Happy Home Anniversary!

Post Close Purchase Anniversary



Hi Teddy,

Thank you for your partnership and assistance during {{borrower.f_name}}'s home buying process. It was wonderful working with you to achieve our clients' goals. If you have any questions or need a partner on another sale, feel free to contact me anytime. Have a great day!

Best,

Media Team

Email Names:

- Post Close - Agent Thank You