

The HELOC Reset Campaign

Homeowners with HELOCs may be approaching the end of their draw period without realizing how their payment could change. This campaign gives you a reason to start that conversation before the homeowner is under pressure.

YOUR QUICK START:

Customize the HELOC Reset Check with your contact information and brokerage details. Save your finished version as a PDF before offering it to consumers.

Create a simple landing page on your website or lead-capture platform and put the worksheet behind a contact form.

Share the landing page with your database and use it as a resource when HELOC questions come up in conversations or content.

Follow up personally with the people who request it.

Landing Page

Create a simple landing page on your website or lead-capture platform and put the worksheet behind a contact form.

Suggested Headline

Is Your HELOC Payment About to Change?

Suggested Subhead

The HELOC Reset Check is a simple worksheet designed to help homeowners identify important dates, understand their current numbers, and prepare better questions for their lender.

A Little More Context

If your HELOC draw period is ending, your payment structure may change. Spending 15 minutes with your latest statement can help you understand what may be coming and what questions you need answered.

Contact Form

Get the HELOC Reset Check

Complete the form below for immediate access to the worksheet.

Suggested Fields

First Name

Last Name

Email

Phone **optional unless your own consent language and system support it appropriately*

Button

Get the HELOC Reset Check

After Submission

Send the homeowner directly to your customized PDF or to a simple thank-you/download page.

Important:

Add your own brokerage disclosures, privacy language and any required consent language based on your company, website platform and local requirements..

Follow Up

Follow up personally with the people who request it.

Subject: Your HELOC Reset Check

Hi [First Name],

Here's the HELOC Reset Check you requested.

Start with your latest HELOC statement and work through the worksheet before you call your lender. It should help you identify the dates and numbers you need, along with some questions worth asking.

If your HELOC has you wondering how your home's current value fits into the picture, I'm happy to help you look at that side of the equation.

You don't need to know what you want to do with the house before we talk. Sometimes getting the numbers together is simply the best place to start.

[YOUR NAME]

[BROKERAGE]

[PHONE]

[EMAIL]

You've Got the Campaign. What's Next?

I gave you this campaign because I want you to use it. Customize the worksheet, get it in front of the people you serve, and start the conversations that need to happen.

If putting this together has you thinking about your own business, where your next opportunities are coming from, what deserves your attention, or how to turn more of what you know into action, I'd love for you to take the next step with me..

What's Your Next?

Your Next Move is a complimentary 30-minute strategy conversation designed to help uncover what may be getting in the way of your growth and identify a useful path forward.

I made a short video for you first. Watch that, then choose a time to meet by Zoom with a member of my strategy team.

FIND YOUR NEXT

>> <https://www.leighbrown.com/next>