

Project Overview – Mortgage Broker Sales Funnel (Chicago, USA)

Objective

Build a high-conversion funnel for a Chicago-based mortgage broker targeting first-time homebuyers, families upgrading, and investors. The funnel should:

- Capture leads through a valuable pre-approval checklist.
 - Nurture prospects with proof-driven, empathetic emails.
 - Drive urgency toward a free pre-approval consultation.
 - Build trust with social proof, authority, and local expertise.
 - Boost ROI with follow-ups and a thank-you/upsell page.
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Funnel Assets

1. Opt-in Page

- **Headline:** “Want to Buy a Home in Chicago? Get Pre-Approved in Days, Not Weeks.”
 - **Lead Magnet:** Free Pre-Approval Checklist.
 - **CTA:** “Get My Free Pre-Approval Checklist.”
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2. Nurture Email Sequence (3 emails)

- **Email 1:** Deliver checklist + curiosity (tease common mistakes).
- **Email 2:** Proof + empathy (success story: Sarah & Mark).
- **Email 3:** Urgency + pitch (Chicago homes move fast → book pre-approval now).

3. Reminder & Follow-Up Emails (2 emails)

Email 4 – Reminder:

- **Subject:** Still thinking about pre-approval?
- **Hook:** Every day without pre-approval = another house off the market.
- **CTA:** “Start your free pre-approval today.”

Email 5 – Final Follow-Up:

- **Subject:** Last call before rates shift again...
- **Hook:** Mortgage rates and homes both move fast in Chicago. Waiting costs money.
- **CTA:** “Lock in your spot for a free pre-approval session.”

4. Sales Page

- **Hero:** “Get Pre-Approved Fast & Secure the Best Mortgage in Chicago.”
- **Problem Hook:** Jargon, rejection fears, Chicago’s fast-moving market.
- **Authority:** 20+ families helped in 2024, 50+ lenders, 10 years of experience.
- **Offer Breakdown:** Faster approvals, better rates, personal guidance.
- **Social Proof:** Testimonials from first-time buyer & investor.
- **Risk Reversal:** “If we can’t find a loan that makes sense, you walk away — no cost.”
- **CTA:** “Start My Free Pre-Approval Today.”

5. Thank You / Upsell Page


Headline: “You’re One Step Closer to Your New Home in Chicago.”

- Thank them for requesting the checklist or booking a call.

- Reassure them: “Check your inbox — I’ll personally reach out within 24 hours.”
 - **Upsell Opportunity:** Offer a *Mortgage Strategy Session Upgrade* (e.g., a \$97 consultation waived if they move forward with a loan).
 - **CTA Button:** “Claim My Free Strategy Session.”
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Key Features of the Funnel

- **Ego-sensitive positioning:** Buyers = “savvy,” “smart,” “prepared,” never “clueless.”
 - **Lifestyle angle:** Security, confidence, freedom of owning in Chicago.
 - **Proof & trust:** Testimonials, 20+ families helped, local expertise.
 - **Urgency & scarcity:** “Homes sell fast in Chicago,” “Rates shift daily,” “Only X slots left for pre-approval.”
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 With this structure, you now have a **full-funnel portfolio project**:

- **Opt-in page**
- **Lead magnet delivery emails**
- **Reminder/follow-up sequence**
- **Sales page**
- **Thank-you/upsell page**

Opt-in Page – Mortgage Broker (Chicago, USA)

Hero Section

Headline:

“Get Pre-Approved in Days — Not Weeks — for Your Chicago Home”

Subheadline:

Smart buyers don't wait until it's too late. Discover how to lock in the best mortgage rates and shop with confidence in Chicago's fast-moving market.

CTA Button (above the fold):

👉 “Send Me the Free Pre-Approval Checklist”

Problem Hook

If you're looking to buy in Chicago, you already know:

- Homes sell in days, not months.
- Banks bury you in jargon and red tape.
- Rates change constantly — and waiting could cost you thousands.

Without the right pre-approval, you risk losing your dream home to someone who's better prepared.

Authority / Why Us

I've helped 20+ Chicago families get approved in 2024 alone — from first-time buyers to investors.

With access to 50+ lenders across Illinois, I shop rates for you and guide you through every step.

You don't need another confusing “bank offer.”
You need a trusted local expert who's in your corner.

Offer Section

When you grab the **Free Pre-Approval Checklist**, you'll discover:

- The 5 documents lenders actually care about (and the ones that don't matter).
- How to get approved *even if your credit isn't perfect*.
- The fastest way to know exactly what you can afford.
- Insider tips to avoid hidden fees banks won't tell you about.

Imagine walking into your next open house with the confidence of a cash buyer — because you already know you're approved.

Social Proof (Optional, if used on portfolio)

🗣️ *"We thought our credit would hold us back, but [Broker's Name] got us approved in just 6 days. We're now in our dream home in Lincoln Park."* — Sarah & Mark T.

Final CTA Section

Don't let another home slip away in Chicago's hot market.
Get the checklist that puts you ahead of 70% of buyers.

👉 **[Send Me My Free Pre-Approval Checklist]**

✅ Why this works for lead gen + traffic:

- **Short, bold headline (<12 words)** → promise clarity + speed.
- **Pain + urgency** → Chicago homes move fast.
- **Authority** → 20+ families helped, 50+ lenders.
- **Lead magnet CTA** → low-friction, high-value (checklist = easy opt-in).
- **Scannable copy** → bullets, bold phrases, conversational flow.

Email 1 – Curiosity + PAS (Problem, Agitate, Solve)

Subject: The \$11K mistake Chicago buyers make

Hook/Lead:

Most buyers lose their dream home before they even make an offer.
One missed step → thousands lost.

Body:

Here's the truth: in Chicago, **7 out of 10 buyers skip the most important step**.
They think they're ready... but then the house they love is gone.

Why? Because they walked in **without proper pre-approval**.

The worst part?

Doing it wrong can cost **\$11,000 or more over the life of a loan**.

That's why I created the **Free Pre-Approval Checklist**.

Inside, you'll discover:

- The 5 documents lenders *actually* care about (skip the rest).
- How credit challenges don't always equal rejection.
- The "timing trick" savvy buyers use to beat the Chicago market.

👉 Grab your checklist now: [\[link\]](#)

Tomorrow, I'll share the #1 pre-approval blunder that nearly killed a deal.

Talk soon,

[Broker Name]

Email 2 – Storytelling + Fascinations

Subject: Closed in 6 days — credit not perfect

Hook/Lead:

Banks told Sarah & Mark "not yet."
Six days later, they were approved — and moving in.

Body:

When Sarah & Mark came to me, they were frustrated.
Every bank had turned them down.

But instead of giving up, we did things differently:

- Matched them with a lender from a pool of 50+.
- Positioned their credit history the right way.
- Fast-tracked their paperwork.

Result? Pre-approval in 6 days.

Dream home in Lincoln Park secured.

Here's the kicker → they almost didn't try because they thought credit disqualified them.

That's the mistake so many buyers make.

In tomorrow's email, I'll break down how to know if FHA, VA, or conventional is right for *you*.

Talk soon,
[Broker Name]

 **Email 3 – AIDA + Scarcity**

Subject: Homes sell in DAYS. Are you ready?

Hook/Lead:

In Chicago, hesitation kills deals.
Winners walk in ready — losers watch homes vanish.

Body:

Here's why pre-approval isn't optional anymore:

- **Speed wins** → Sellers won't wait for your bank.
- **Better rates** → Brokers shop 50+ lenders for you.
- **Confidence at the table** → Pre-approved buyers get taken seriously.

Imagine touring an open house this weekend knowing:

"If I want it, I can make an offer right now."

That's the advantage pre-approval gives you.

👉 Start your free pre-approval today: [link]

But don't wait — rates shift daily, and my free pre-approval spots this week are limited.

To your new home,
[Broker Name]

✅ What's new here:

- Subject lines are punchy & inbox-stopping.
- Hooks hit in 1–2 lines → set tension immediately.
- Fascinations (short bullets) tease insider knowledge, pulling readers deeper.
- Frameworks used smartly: **PAS for curiosity**, **Storytelling for empathy/proof**, **AIDA for urgency/pitch**.
- Flow = clean, human, easy to scan.

Email 4 – Reminder (Gentle Nudge)

Framework: PAS (Problem → Agitate → Solution)

Subject: Still thinking about pre-approval?

Hook/Lead:

Every day you wait... someone else gets approved.

Body:

Chicago's market doesn't sit still.

Homes go under contract in **days**, not months.

And here's what happens if you're not pre-approved:

- The house you love? Gone before your offer's even ready.
- Rates shift overnight → costing you thousands.
- Sellers don't take your offer seriously without proof.

The smart move? Get pre-approved **before you shop**.

👉 Start your free pre-approval today: [link]

Talk soon,
[Broker Name]

Email 5 – Final Follow-Up (Last Chance)

Framework: AIDA + Scarcity/Urgency

Subject: Last call before rates shift again...

Hook/Lead:

This could cost you thousands — or your dream home.

Body:

Here's the truth: rates don't stay still. Neither do Chicago homes.

That's why I keep my pre-approval spots limited.

When I'm focused on active buyers, I can't take on new ones.

Right now, I have a few openings left this week. After that, I'll be closing applications.

So if you're serious about buying or refinancing, this is it.

👉 Reserve your free pre-approval now: [link]

Don't wait until the home you love slips away.

Talk soon,
[Broker Name]

✅ Now your **5-email sequence is complete**:

1. **Email 1** → Curiosity + Checklist delivery
2. **Email 2** → Storytelling + Proof
3. **Email 3** → Pitch + Urgency
4. **Email 4** → Gentle reminder (nudge)

5. **Email 5** → Final push (scarcity + FOMO)

This creates a **smooth flow**: educate → build trust → pitch → remind → close.

Sales Page 1 – Benefit-Driven

Hero Section

Headline:

“Own Your Chicago Home With Confidence (and a Better Rate)”

Subheadline:

Get pre-approved fast, compare 50+ lenders, and save thousands over the life of your loan.

CTA Button:

👉 “Start My Free Pre-Approval Today”

Problem Hook

Buying a home in Chicago should feel exciting... not overwhelming.

But most buyers get stuck with:

- Banks offering limited (and often expensive) loan options.
- Delays that make them lose out on homes they love.
- Confusion about FHA, VA, or conventional loans.

The result? Stress, wasted time, and money left on the table.

Authority / Why Work With Me

I’ve been helping Chicago families, first-time buyers, and investors for over a decade.

- ✅ 20+ families approved in 2024 alone
- ✅ Access to 50+ lenders across Illinois
- ✅ Local expertise in neighborhoods from Lincoln Park to Naperville

Instead of pushing one bank's agenda, I shop smarter, negotiate harder, and guide you every step of the way.


Offer Section – What You Get


When you work with me, you'll enjoy:

- **Lower Payments** → The best terms mean you save thousands over the life of your loan.
- **Peace of Mind** → A process where paperwork isn't a nightmare.
- **Confidence** → Walk into open houses knowing you can make an offer.
- **Guidance** → FHA, VA, jumbo, or conventional — I'll match you with the right option.
- **Speed** → Pre-approvals in days, not weeks.

Imagine moving into your Chicago home, knowing you got the best deal possible.

Social Proof

 "We thought our credit would hold us back, but [Broker's Name] got us approved in just 6 days. We're now in our dream home in Lincoln Park." — Sarah & Mark T.

 "I saved \$312 a month on my refinancing thanks to [Broker's Name] shopping lenders for me. That's over \$3,000 a year back in my pocket." — Kevin H.

Risk Reversal

No hidden fees. No obligation.

If we can't find a loan that makes sense, you walk away — no cost.

Final CTA

Don't settle for stress, delays, or bad terms.

Get the rate, confidence, and guidance you deserve.

 **[Start My Free Pre-Approval Today]**



Sales Page 2 – Curiosity-Driven

Hero Section

Headline:

“The Mortgage Shortcut Most Chicago Buyers Don’t Know About”

Subheadline:

Banks won’t tell you this — but savvy buyers use a simple system to lock in better rates and win homes faster.

CTA Button:

👉 “Unlock My Free Pre-Approval Checklist”

Problem Hook

Here’s the truth: banks aren’t designed to help *you*.
They’re designed to sell *their loan*.

That’s why:

- Buyers get stuck with high rates.
- Perfectly qualified people get rejected.
- Deals fall through because of slow paperwork.

And the crazy part?

Most buyers don’t even realize they have better options.

Authority / Why Work With Me

I’ve been on the inside of Chicago’s mortgage scene for over 10 years.

- ✅ 50+ lenders compared — so you’re not trapped by one bank.
- ✅ 20+ families approved in 2024 alone.
- ✅ Fast-tracked approvals tailored to Chicago’s fast market.

I know the shortcuts banks don’t share — and I put them to work for my clients.


Offer Section – What You Get


When you grab the **Free Pre-Approval Checklist**, you'll discover:

- **The 5 documents lenders really want** (the rest are fluff).
- **Why less-than-perfect credit doesn't always mean rejection.**
- **How timing your application right** can save thousands.
- **Which mortgage type is right for you** (FHA, VA, conventional, jumbo).
- **The local "rate gap" trick** that Chicago buyers use to beat the market.

These are the hidden insights that make the difference between "offer accepted" and "dream home lost."

Social Proof

 *"I thought my credit history would kill my chances. [Broker's Name] showed me an option my bank never even mentioned. Approved in under a week." — Angela P.*

 *"He explained things no one else told me — saved me over \$9,000 in the first year alone." — David L.*

Risk Reversal

This isn't about pushing you into a loan.

It's about giving you insider clarity — so you can make the smartest move for your future.

Final CTA

Don't rely on what the banks want you to know.

Get the checklist and discover the shortcuts Chicago buyers are using right now.

 **[Unlock My Free Pre-Approval Checklist]**



Sales Page 3 – Urgency-Driven

Hero Section

Headline:

“Chicago Homes Sell in Days. Don’t Miss Out.”

Subheadline:

Without pre-approval, you’re not even in the game. Secure yours now before the next home slips away.

CTA Button:

👉 “Get Pre-Approved Now — It’s Free”

Problem Hook

Chicago’s housing market moves fast.

- Homes disappear in days.
- Sellers won’t even consider offers without pre-approval.
- Rates change daily — waiting can cost thousands.

If you don’t act fast, you don’t stand a chance.

Authority / Why Work With Me

I help buyers move as fast as the market.

- ✅ Pre-approvals in days, not weeks
- ✅ Access to 50+ lenders with competitive rates
- ✅ Trusted by 20+ Chicago families in 2024

When the right home comes up, my clients don’t hesitate — they’re ready.

Offer Section – What You Get

Here’s how I put you ahead of the competition:

- **Fast Pre-Approval:** Green light to make offers within days.
- **Multiple Lenders Compared:** Don't settle for one bank's terms.
- **Local Expertise:** Chicago market insights built into your strategy.
- **Confidence with Sellers:** Pre-approval proves you're serious.
- **Limited Spots Available:** Free strategy sessions fill quickly each week.

In this market, waiting isn't an option.

Social Proof

🗨️ *"We almost lost our chance — homes were selling too fast. [Broker's Name] got us pre-approved in 4 days and we landed our dream home." — Jessica & Tom W.*

🗨️ *"As an investor, timing is everything. This broker moves faster than the banks — I closed on a 3-unit in Pilsen without missing a beat." — Marcus J.*

Risk Reversal

If I can't get you a financing option that works, you walk away.
No cost. No obligation. No risk.

Final CTA

Chicago homes don't wait. Neither should you.

👉 **[Get Pre-Approved Now — It's Free]**

✅ **3 complete variations:**

- **Benefit-Driven** → Confidence, savings, smooth process.
- **Curiosity-Driven** → Hidden shortcuts, insider tips.
- **Urgency-Driven** → Fast market pressure, FOMO.

Thank You + Upsell Page – Mortgage Broker (Chicago, USA)

Headline (Gratitude):

✔ Thank You! You're Already Ahead of Most Buyers in Chicago

Section 1 – Reassure

Hey [First Name],

Your request came through successfully 🎉.

Your **Pre-Approval Checklist** is on its way to your inbox now.

This simple step already puts you ahead of 70% of buyers who wait too long.

Section 2 – Add Value (Upsell)

But let's be honest: a checklist alone won't get you the keys.

That's why I created the **Mortgage Strategy Session**:

- A **1-on-1 call** where I review your credit, income, and goals.
- Show you the **fastest path to approval** (so you never miss out on a home).
- Reveal exactly **what you can afford** — before you even tour.
- Give you a clear, customized mortgage roadmap.

Normally, this call is **\$97**, but since you just signed up, you can **claim it free today only**.

Section 3 – Bridge to Next Step (CTA)

👉 **Yes, I Want My Free Strategy Session**

Spots are limited — once this week's calendar is full, I'll close the offer.

Section 4 – Reassurance (Safety Net)

If you just want the checklist, that's fine — it's already on the way.

But if you're serious about getting into your Chicago home *faster and smarter*, this free strategy session is the shortcut.

✅ Why this works:

- **Framework flow:** Gratitude → Reassure → Add Value → Bridge.
- **Ego-sensitive wording:** Buyers are “ahead,” “smart,” “savvy.”
- **Lifestyle focus:** Owning sooner, no stress, confidence.
- **Urgency:** Limited session spots.
- **Risk reversal:** “Checklist is yours regardless.”

Ad 1 – Curiosity Angle

Headline (under 7 words):

“The Mortgage Shortcut Banks Don’t Share”

Script:

👁️ Did you know most Chicago buyers overpay — simply because they don’t know this one shortcut?

Banks only offer their own loans.

Smart buyers? They use a broker who shops **50+ lenders** — unlocking better rates and faster approvals.

The crazy part? It’s free to start.

👉 Download your **Free Pre-Approval Checklist** and see how savvy buyers beat the market.

CTA: “Get My Free Checklist”

Ad 2 – Pain Angle

Headline:

“Don’t Lose Your Dream Home”

Script:

In Chicago, homes sell in **days**.

But 7 out of 10 buyers walk in unprepared.

Here’s what happens:

- ❌ No pre-approval → sellers ignore your offer.
- ❌ Rates change daily → you pay more than you should.
- ❌ Banks stall you with paperwork → the house is gone.

Don’t let that be you.

👉 Start your **free pre-approval today** and shop with confidence.

CTA: “Get Pre-Approved Now”

Ad 3 – Aspirational Angle

Headline:

“Move Into Your Chicago Dream Home Faster”

Script:

Imagine walking into your dream home this weekend...
and knowing you’re already approved to buy it. 🏡✨

That’s the power of smart pre-approval.

- ✅ Approved in days, not weeks.
- ✅ Best rates from 50+ lenders.
- ✅ Stress-free, guided process from start to finish.

All it takes is one click.

👉 Claim your **Free Pre-Approval Checklist** today and start shopping with confidence.

CTA: “Start My Free Pre-Approval”

✅ Why these work:

- **Scroll-stopping openers** (👁️, ❌, 🏡) → pattern interrupt.
- **Simple, conversational tone** (no jargon, easy to scan).
- **Clear CTA** (low-friction, free lead magnet).
- **Angles stacked** so you can test curiosity vs pain vs aspirational.