

Refi Magic: Ignite New Business from Dormant Leads

Unlock hidden revenue in your mortgage brokerage with our automated engagement and active-nurturing system.

Built for forward-thinking brokers who want to scale efficiently and maximize every opportunity.



Evergreen Mortgages.

Your dreams.
Our expertise.

The Problem

Mortgage brokers lose millions in potential commissions from past clients who refinance elsewhere.



Dormant Leads

Thousands of past clients sit untouched in your database.



Manual Follow-Up

Keeping track of ideal refi timing is impossible manually.



Lost Revenue

Clients refinance elsewhere when rates drop, costing you commissions.





You're Conundrum

80%

Untouched Leads

Old leads never re-contacted by brokerages

70%

Missed Refinancing

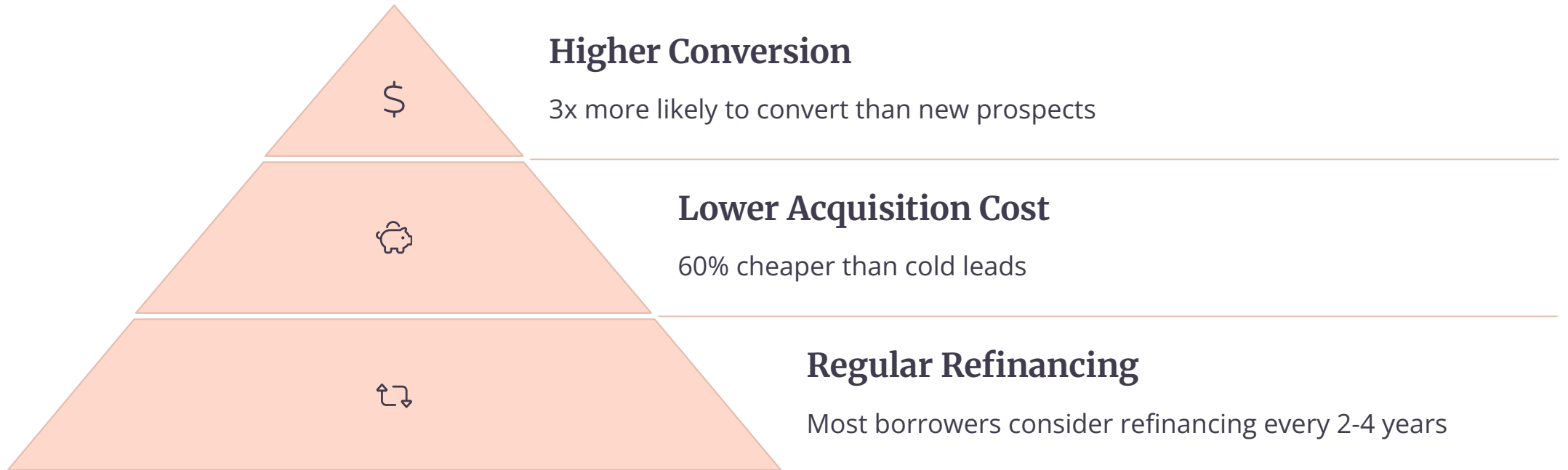
Refinance opportunities missed or delayed

100%

Resource Drain

Manual follow-up consumes valuable time

The Value Hidden in Your Past Leads



Why Current Broker CRM Solutions Fall Short

Not Client-Specific

Broker CRMs lack client-specific refinance triggers and automated outreach parameters.

Manual Effort Required

Brokers waste hours sorting data and making follow-up calls that could be automated.

Poor Timing

Broker systems can't predict optimal refinance windows based on market conditions and client history.

Incomplete Integration

Broker tools don't connect directly with the latest innovations in Voice and Generative AI.

Your team shouldn't be data miners. Refi Magic automates the entire process, freeing your experts to close deals, not hunt for them.

Internal CRM client retention tools lack the specialised automation and targeting precision needed to proactively identify and convert refinance opportunities. They still require significant human interaction, time and effort to manually track and engage/follow up with clients.

The Mortgage Brokering Challenge

Today's mortgage brokers face an uphill battle. Client databases grow larger while refinance opportunities slip through the cracks.



Data Overload

Most brokers collect thousands of past clients with no systematic way to identify opportunities.



Manual Processes

Hours wasted sifting through records to find potential refinance candidates.



Tedious Follow-up

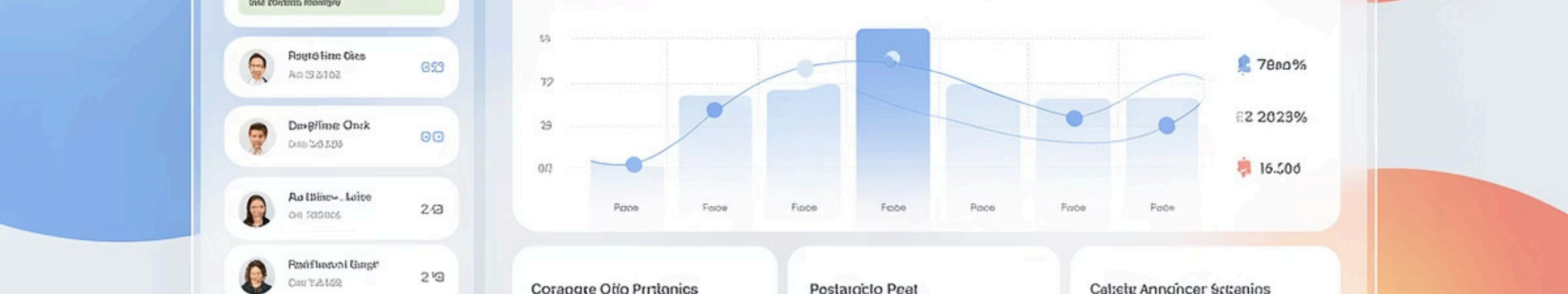
Inconsistent outreach leads to missed connections and lost business.



Market Timing

Rate fluctuations create refinance windows that close before brokers can act.

Current Broker CRM solutions simply weren't built for the new demands of mortgage refinancing.



What is Refi Magic?

Specialized Automation

Platform designed specifically for mortgage brokers to revitalize dormant leads.

Opportunity Identification

Instantly flags qualified refinance opportunities hiding in your database.

Seamless Integration

Works with your existing CRMs and loan origination tools with minimal setup.

How Refi Magic Works



Scan & Identify

Scans your old leads and flags refinance eligibility



Automate Communications

Triggers compliant outreach via email, SMS, and calls



Generate Options

Proposes refinance options using latest market data



Automatic Appointment Bookings

Easy integration with your calendar for qualified and ready clients

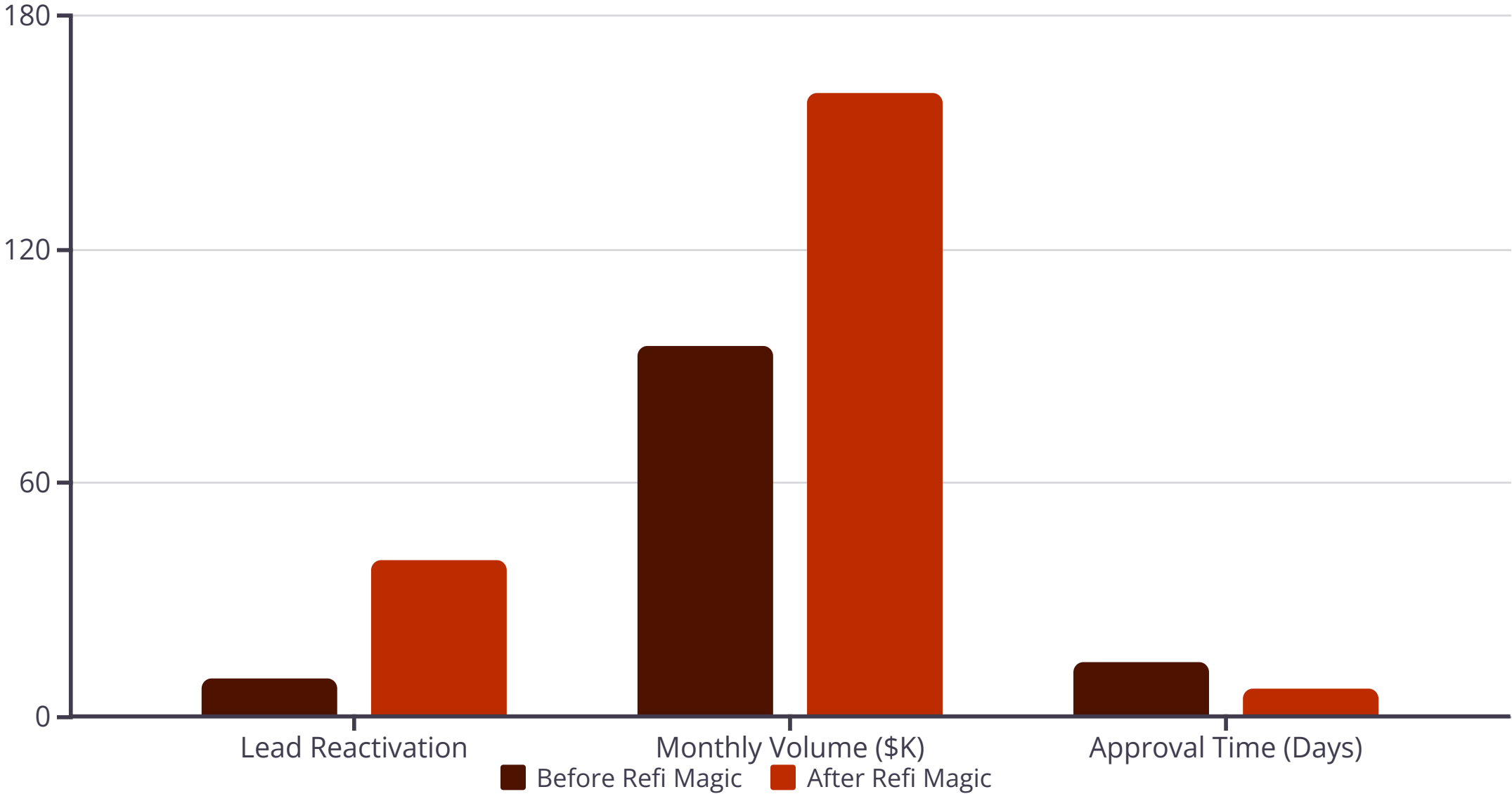


Refinance Made Easy

Find the best rates and streamline your refinance journey

[Check Your Rate](#)

Real-World Impact



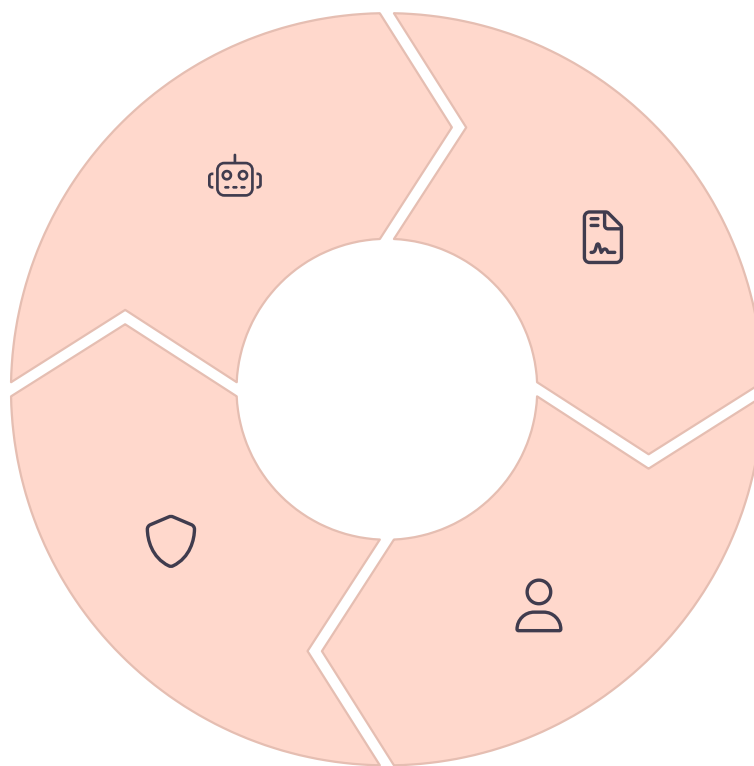
Key Features for Winning More Business

Automated Campaigns

Fully automated follow-up drip campaigns

Built-in Compliance

Never miss reporting or GDPR requirements



Individual Messaging

Each client receives unique messaging and guidance based on their personal needs

Smart Segmentation

Targets likely-to-refi clients with personalized offers



Your dreams.
Our expertise.

Next Steps: Future-Proof Your Business

Transform Dead Leads

Turn your database into a powerful growth engine. Stop leaving money on the table.

Book a Demo

See results in week one. Our team will show you exactly how it works.

Secure Your Future

Don't let yesterday's leads fund someone else's tomorrow. Act now.