Leap™

QUICK-START GUIDE

Your Consumer Financing Launch Kit

Put your financing on autopilot. With Leap CRM, financing isn't just a conversation you have at the kitchen table - it's a competitive advantage built into your workflow, ensuring every homeowner has an affordable path to saying 'Yes'.

$750k
Max HELOC Funding

5 Days
Fastest HELOC Funding

$100k
Max Unsecured Loan

+30%
Lead Conversion Lift

THE FOUR STEPS

1. **Master the Pitch**
   Scripts & two lender options to help close every project.
2. **Homeowner Flyer**
   Printable leave-behind comparing both lender options.
3. **Marketing Toolbox**
   Email signatures and website copy ready to copy, paste, and publish.
4. **Social & Signage**
   From social media posts to yard sign templates to win the neighborhood.

Use these four simple steps to turn every customer touchpoint into a high-converting lead machine

HOW IT WORKS

Your "Apply for Financing" Button

On Every Invoice/Document/Estimate: Give homeowners an easy way to pay built into your Leap CRM workflow.

Inside the Customer Portal: Let homeowners explore their buying power privately, on their own time, and on their own device.

SETUP

In Leap CRM head to **Settings** → **Financing** and copy your unique link. You'll receive an email anytime the homeowner is approved and funded so you can move forward with confidence.

STEP 1 - MASTER THE PITCH

Stop Selling Price. Start Selling Affordability.

Don't wait for the price to **scare** them.
Bring up monthly affordable payments as soon as you start discussing the scope.

THE BUDGET ALIGNMENT CONVERSATION

> "Before we get into the final numbers, I want to show you how most of our clients keep their savings liquid while still getting exactly what they want. We offer two 'smart-money' paths that let you break this down into a manageable monthly budget instead of one big check."

TWO WAYS TO FUND

Path A - Speed & Simplicity

The Unsecured Loan

Powered by LightStream

"This option focuses on speed. It's an unsecured loan, which means your home isn't used as collateral and there's no appraisal required. It's the most straightforward path to getting the project on the calendar—the funds can be in your account as soon as today."

The Contractor Win
Perfect for keeping the momentum of the sale, this path is for homeowners with good credit who need fast funding. Same-day funding is available (conditions apply), so you can move from a signed contract to a scheduled project in a matter of hours, not weeks.

Best for: Quick funding without using home equity

Path B - Power & Performance

The Home Equity Line

Powered by Figure

"This option focuses on long-term value. It's a digital Home Equity Line of Credit (HELOC). By leveraging your home's equity, you can unlock higher funding limits and the most competitive interest rates. It's designed for major investments where keeping your monthly payment as low as possible is the priority."

The Contractor Win
Use this to "save" the deal on high-ticket remodels. It makes large projects feel affordable by spreading the payments at the lowest possible rates.

Best for: Lowest rates via home equity + 60sec soft credit pull

The Closer

> "I can email you a link right now so you can compare both LightStream and Figure to see which works best for your budget. You can apply for either option straight from your phone."

Tip: Head to Leap CRM → Settings → Financing **to pull this unique link! We'll email when the customer applies, gets approved and funded.**

BUILD TODAY. PAY LATER.

Flexible Financing Tailored to You

Don't let your dream project be limited by your immediate cash on hand. Here are two contractor recommended lenders that provide you with a seamless, digital-first financing experience.

CHOOSE YOUR FUNDING PATH

Option 1 - Secured

Home Equity Line (Figure)

Best for large-scale transformations & major remodels

- **Maximize Your Power:** Tap into your home's equity to access up to $750,000 in project capital.
- **The Lowest Rates:** Most competitive interest rates, secured by home equity.
- **Fastest HELOC in the Industry:** Traditional bank equity lines take 45+ days. Get funded in as little as 5 days with Figure's fully digital process.
- **Tax Advantages:** Interest on home improvement equity lines may be tax-deductible *(consult your tax advisor)*.
- **Pay Only for What You Use:** Flexible draw periods mean you only borrow what the project requires.

Option 2 - Unsecured

Personal Loan (LightStream)

Best for urgent repairs, upgrades, & projects up to $100k

- **No Collateral Required:** Borrow $5,000 - $100,000 when you have good credit, without using your home as a guarantee. Your home equity remains untouched.
- **Fast Funding:** Apply online & get funds deposited into your bank account quickly.
- **Zero Fees. Period:** No origination fees, no application fees, & no prepayment penalties.
- **Fixed Rates, No Surprises:** Get predictable payments with a fixed rate for the life of your loan.
- **Flexible Project Use:** Cover everything from kitchens & bathrooms to roofing, pools, & landscaping.

FEATURE COMPARISON

Feature	Secured (HELOC)	Unsecured (Personal)
Max Loan Amount	Up to $750,000	Up to $100,000
Collateral	Home Equity	None (Unsecured)
Funding Speed	~5 Days	Fast Funding (conditions apply)
Credit Impact	Soft Pull to See Rates	Hard Pull to See Rates

Why Digital Financing?

Paperless Experience: Apply from your phone/tablet in minutes. No paperwork, no bank branch visits.
Direct Funding: Funds go straight to your account, you control the project timeline.

Ready to See Your Options?

Ask me for my unique link to apply.

STEP 3 - MARKETING TOOLBOX

Practical "Copy & Paste" Assets for Your Digital Presence.

Don't bury your financing options in a footer. Create a dedicated "Financing" tab in your main navigation and place copy on your "Request an Estimate" page. Showing affordability before they see the price can increase your lead conversion by up to 30%.

EMAIL SIGNATURE OPTIONS - COPY & PASTE

Click the hyperlinks to learn how to add a signature in Outlook and Gmail.

Direct & Urgent - Best for Closing Deals

Start today, pay later. View our financing options and see your buying power in 60 seconds:
View options here → [Link] (Insert link from step 1 on page 1)

Consultative - the "Ask Me" Approach

Ask me about our financing options. Everything from $0-down unsecured loans to low-rate home equity lines.
Click here to see which option fits your budget (Insert link from step 1 on page 1)

Budget-Friendly - Focuses on Monthly Cost

Don't let the total price hold you back. We can break your project into small, manageable monthly payments.
Check your options here → [Link] (Insert link from step 1 on page 1)

WEBSITE "FINANCING" SECTION - COPY & PASTE

Flexible Financing Built for Your Project

Your project shouldn't be limited by what's in your account today.
We offer two financing paths designed to fit your budget, your timeline, and your goals.

Path A — Fast & Simple
Unsecured Personal Loan

- Borrow up to $100,000 with no equity required
- Same-day funding available (conditions apply)
- Low fixed rates, no fees, & no prepayment penalties
- Best for those with good credit

Path B — Maximum Buying Power
Home Equity Line

- Access up to $750,000 using your home's equity
- Most competitive rates available
- Funded in as little as 5 days
- Interest may be tax-deductible on home improvement projects (consult your tax advisor)

How It Works

1

Choose Your Lender
Compare unsecured vs. secured lenders to see what works best for you.

2

Instant Decision
Complete a fast, simple digital application.

3

Start Your Project
Once approved, you have the funds to pay your contractor.

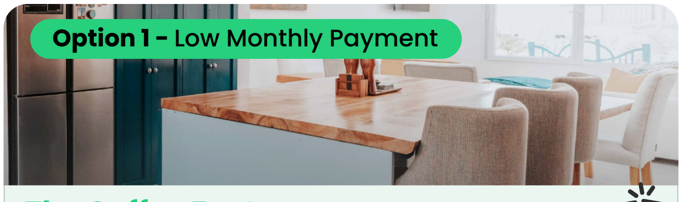
Apply Now [BUTTON] (Change to Link to personal link from page 1)

STEP 4 - SOCIAL MEDIA

Download, Edit, Publish.

Simply download and post on social media to promote financing!
Canva templates allow you to make changes, add your logo, or post them as is.

Option 1 - Low Monthly Payment

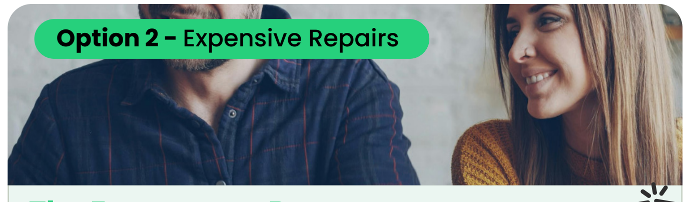


The Coffee Factor

Make cost feel small by comparing it to daily expenses.

Caption: What if your biggest home project cost less per month than you think? We offer flexible payment plans with terms up to 15 years, fixed rates, and funding available in as little as 24 hours. No equity required. See your buying power here: [Link]

Option 2 - Expensive Repairs



The Emergency Rescue

Relieve the stress of unexpected repairs.

Caption: Unexpected repairs don't have to mean an unexpected financial hit. We offer fast approval financing with no hard credit pull to see your rates and funding available in as little as one business day. Check your options here: [Link]

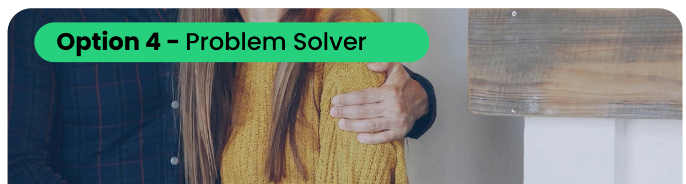
Option 3 - Secured vs. Unsecured

Dream Bigger

Target high-ticket "Dream Remodels".

Caption: Ready for the full transformation? We offer unsecured loans with no equity required and secured options with the lowest possible rates on major remodels. Up to $750,000 in funding with no prepayment penalties. See your personalized payment options here: [Link]

Option 4 - Problem Solver



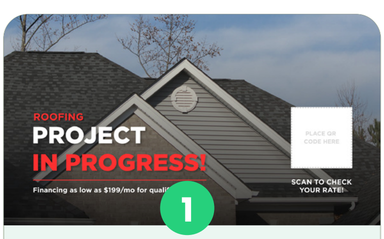
Financial Peace of Mind

Position contractors as problem-solving partners, not just as providers.

Caption: Home projects can feel overwhelming. Paying for them doesn't have to be. Whether it's an urgent repair or a long-planned upgrade, we offer flexible payment plans built to fit your budget with $0 down options available. See your monthly payment options here: [Link]

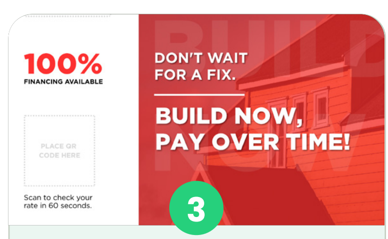
PHYSICAL SIGNAGE

Stand Out in the Neighborhood! Generate a Free QR Code at Code Monkey or Flowcode.
Paste your Step 1 link, match brand color, add logo to center, download SVG or PNG at print quality.



Yard Sign
The Neighbor Magnet

Door Hanger
Neighborhood Canvas



Truck Magnet
The Mobile Office