



HomeEQ
Equity made easy



HELOC MARKETING GUIDE



LEARN ABOUT THE BOOMING HELOC MARKET

Add a digital HELOC to your 2025 product suite.



TARGET YOUR AUDIENCE

Learn how to identify new customers and previous borrowers to target high-level prospects.



CUSTOM BRANDED MARKETING

A full line of white label flyers, social media graphics, and email content on demand.



STRATEGY AND CALENDAR

A detailed one month marketing calendar to create awareness and action from your prospects.



TRAINING AND SUPPORT

Contact your AE for personalized training and support.



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Contact

 sparcassist@home-eq.com

Why Now?

- Many homeowners secured low-rate mortgages from 2020–2022, building significant equity without wanting to refinance.
- With U.S. homeowners holding over **\$33.8 trillion** in home equity, HELOCs provide a smart way to access this value while keeping low mortgage rates intact.

Who to Target?

- Former customers that purchased a home or refinanced between 2020–2022
- Renovators looking to fund home upgrades
- Debt Consolidators with high-interest payments
- Life Event Planners facing significant expenses like college or weddings
- ***Pro Tip:*** Network with financial advisors and accountants to grow your customer base

What's Next?

Our marketing guide equips you with the tools to reach these clients: customizable flyers, email templates, social media content, and a marketing calendar for consistent, targeted engagement.

30-Day HELOC Marketing Campaign Calendar

Click each link on the **Day** to access the marketing content. Check the box after each day and save to keep track of your progress.

<p>Day 1 (Monday) – Email: Introduction to Digital HELOC</p> <ul style="list-style-type: none"> • Audience: All former clients with high equity and low mortgage rates. 	<p>Day 3 (Wednesday) – Social Post: Introduction to Digital HELOC</p> <ul style="list-style-type: none"> • Audience: Social followers, focusing on former clients who follow the broker. 	<p>Day 5 (Friday) – Phone Call: Check-In with Former Client</p> <ul style="list-style-type: none"> • Audience: High-equity clients from 2020-2022, especially those who haven't engaged with recent emails. 	<p>Day 8 (Monday) – Email: Debt Consolidation Focus</p> <ul style="list-style-type: none"> • Audience: Clients with high-interest debt who may benefit from consolidating with a HELOC. 	<p>Day 10 (Wednesday) – Social Post: Debt Consolidation</p> <ul style="list-style-type: none"> • Audience: General social media followers, targeting those carrying high-interest debt.
<p>Day 11 (Thursday) – Phone Call: Realtor Check-In</p> <ul style="list-style-type: none"> • Realtors with clients who may be "rate-locked" and looking for funding alternatives like HELOCs. 	<p>Day 15 (Monday) – Email: Home Improvement Focus</p> <ul style="list-style-type: none"> • Audience: Clients who may want to increase home value through renovations. 	<p>Day 17 (Wednesday) – Social Post: Home Improvements</p> <ul style="list-style-type: none"> • Audience: Homeowners planning renovations who follow on social media. 	<p>Day 19 (Friday) – Phone Call: Check-In with Former Client</p> <ul style="list-style-type: none"> • Audience: Follow-up with former clients, focusing on those with home improvement interests. 	<p>Day 21 (Sunday) – Email: Life Events & Major Expenses</p> <ul style="list-style-type: none"> • Clients likely to need funds for significant life events.
<p>Day 23 (Tuesday) – Social Post: Life Events & Major Expenses</p> <ul style="list-style-type: none"> • Audience: General social audience considering major expenses. 	<p>Day 25 (Thursday) – Phone Call: Realtor Check-In</p> <ul style="list-style-type: none"> • Realtors with clients holding off on moving, who could benefit from a HELOC for remodeling or other funding needs. 	<p>Day 26 (Friday) – Email: HELOC vs. Credit Cards or Personal Loans</p> <ul style="list-style-type: none"> • Audience: Former clients looking for affordable financing alternatives. 	<p>Day 29 (Monday) – Social Post: HELOC vs. Credit Cards or Personal Loans</p> <ul style="list-style-type: none"> • Social followers interested in affordable credit options. 	<p>Day 30 (Tuesday) – Final Social Post: Recap of HELOC Benefits</p> <ul style="list-style-type: none"> • Audience: Social media followers, emphasizing availability to discuss options.

Pro Tip: Create a free calendar link using Calendly to let your contacts easily schedule meetings at a time that suits both their needs and your availability.

[Download Email Templates](#)

Branded Content

Capture attention and strengthen your relationships with HomeEQ's White Label Flyers! Personalize these powerful marketing tools to showcase the benefits of a HELOC and establish yourself as an expert in the market.

- Debt Consolidation
- Home Equity vs Credit Cards
- Finance Major Life Events
- Fast and Fully Digital Experience
- Home Renovations and Upgrades

[Download Flyers](#)

[Download Social Media Graphics](#)

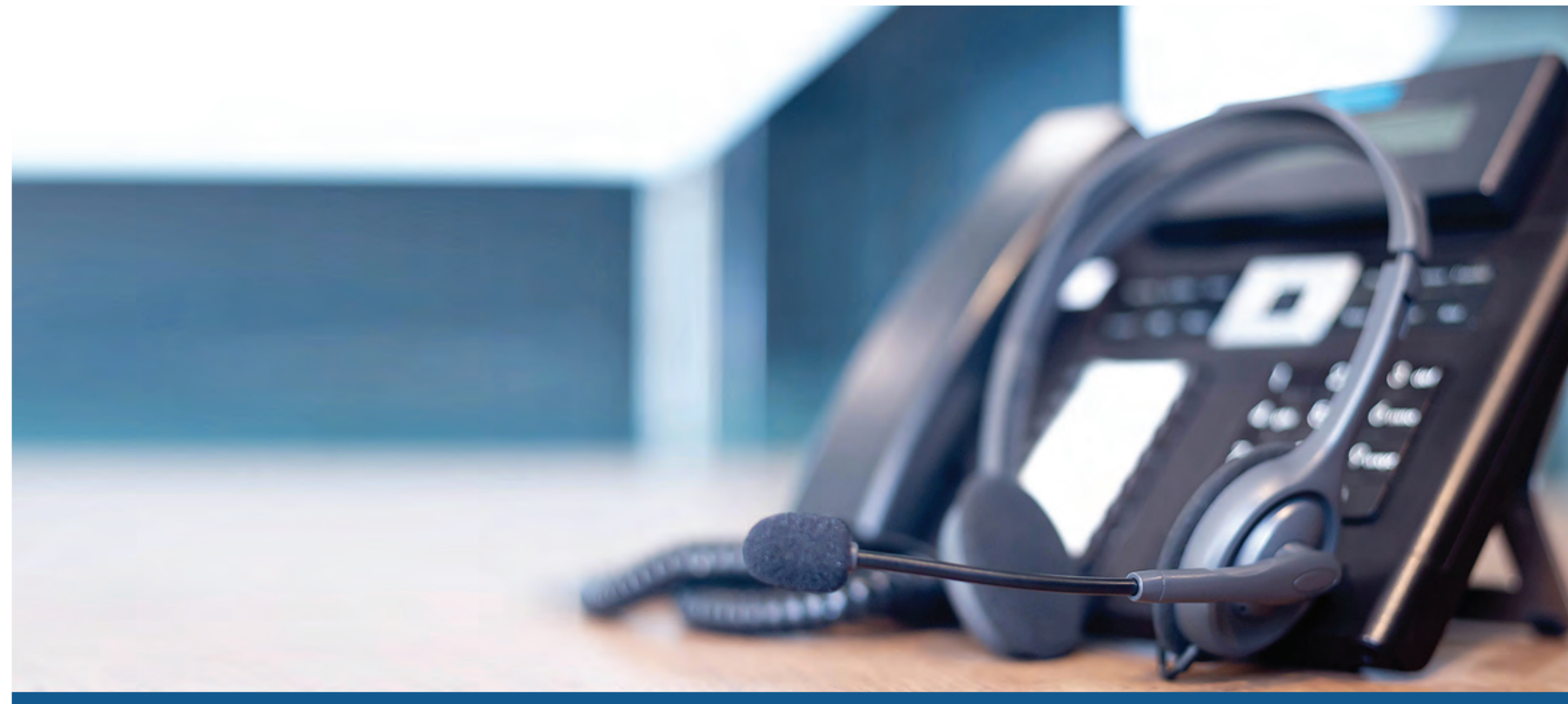
Printable Flyers



Social Media Graphics



Training & Support



We want to make sure you have all the resources you need for a seamless experience. To help you get the most out of the platform, we've put together a few helpful tools, including a demo video that shows just how quick and easy it is to use HomeEQ.

If you have any questions or need further assistance, don't hesitate to reach out to your Account Executive. We're here to ensure your success!

 sparcassist@home-eq.com

[Watch Demo Here](#)

[Benefits and Features](#)

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