

THE SMART MOVE · BC REAL ESTATE CAMPAIGN

Your Campaign, *End to End.*

A walkthrough of every piece in The Smart Move toolkit — what it is, what's in it, and how it fits into your 30 days.

Prepared by Michael Friedman

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What We'll Cover.

Six segments. We'll walk through each one — what it is, what's inside, how you use it, and where it fits in the 30-day rhythm. Then a recap, your launch checklist, and time for questions.

- 01 Toolkit & 30-Day Campaign Guide**
Your operating manual — calendar, scripts, FAQ, handoff process
- 02 Core Smart Move One-Pager**
The client-facing explainer that anchors the campaign
- 03 Email Sequence — 15 Emails Across 3 Tiers**
The drip that does most of the lead-generation work
- 04 Social Media Content Package**
6 posts + 2 video scripts across IG, FB, LinkedIn
- 05 Print Collateral**
Postcard, open-house leave-behind, trifold brochure
- 06 Upsizer Snapshot — Broker-Prepared Analysis**
The one-page personalized financial picture I prepare for each lead

Campaign At a Glance.

The Smart Move shows BC homeowners that today's softer market is the smartest time to upsize — because when prices drop across the board, the gap between what they sell for and what they buy for actually shrinks.

85%

Of Michael's March business came from upsizers, first-time buyers & downsizers — a record month

3

Audience tiers — past clients, sphere of influence, cold contacts

15

Emails written, personalized, and ready to send across all tiers

30

Day campaign calendar — one action per day

48

Hour turnaround on every Upsizer Snapshot request

Tone: 90% educational and trustworthy, 10% pointed urgency. Co-brand model: your name and brand on every piece — mine appears inside as the mortgage partner.

Your Operating Manual.

This is the document you read first. Everything else is execution — this is the playbook that tells you how, when, and why.

It runs eight sections covering audience segmentation, the day-by-day calendar, every script you'll need for phone, text, and voicemail, an objection-handling FAQ that anticipates the seven most common pushbacks, and the precise lead-handoff process between you and me.

Read this before you send anything else.

FORMAT & DELIVERY

How It Ships

- ✓ **HTML version**
Browser-readable, print-friendly
- ✓ **Word version**
Editable .docx — add your notes
- ✓ **~10 pages**
Print double-sided for a working binder
- ✓ **Prepared for realtor use**
Not for client distribution

What's Inside.

Eight sections — designed to be read once, then referenced every day for thirty.

1 Campaign Overview

What this is, how it works, what's in your package

3 Understanding Your Three Audiences

Who gets which email sequence — and why it matters

5 Phone, Text & Voicemail Scripts

Word-for-word scripts for every follow-up scenario

7 Lead Handoff Process

How to pass a warm lead to Michael cleanly and professionally

2 Quick Start — Be Live in One Week

Six steps to go from zero to campaign-ready

4 30-Day Campaign Calendar

Exactly what to do, every day, across all channels

6 Objection Handling FAQ

Seven common pushbacks — and how to respond with confidence

8 After Day 30 — What Happens Next

Maintaining momentum, nurturing non-responders

The 30-Day Rhythm.

Four phases. Email, social, and personal outreach reinforce each other. One action per day — no spike weeks, no quiet weeks.

<p>Phase 1</p> <p>Week 1</p> <p>Equip & Launch</p> <p>Lists finalized, platform set, Email 1 fires, first social posts, one-pager printed</p>	<p>Phase 2</p> <p>Week 2</p> <p>Deepen & Engage</p> <p>Email 2 (the math) + Email 3 (client story) land. Personal follow-ups on Email 1 openers. Reel video.</p>	<p>Phase 3</p> <p>Week 3</p> <p>Nurture & Convert</p> <p>Email 4 — the soft CTA + my introduction. Snapshot requests start coming in. Personal calls.</p>	<p>Phase 4</p> <p>Week 4</p> <p>Convert & Close</p> <p>Email 5 — the nudge. Final personal calls, consultations booked, non-responders move to monthly nurture.</p>
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Every day in the calendar is mapped to a specific channel — email send, social post, phone call, or follow-up. Nothing is left to invent in the moment.

The Anchor.

The single most-used piece in the campaign. It's the explainer you print for open houses, attach to every email, and hand out in person.

One page, both sides used. Front carries the headline message, the math, and the five reasons move-up buyers act now. Back carries the three-step action plan and your contact. It's intentionally educational, not promotional — the math itself is the hook.

"You lose a little on what you sell — but you save even more on what you buy."

USE IT FOR

- ✓ **Open houses**
Have 25+ printed and available before every showing
- ✓ **Email attachments**
PDF attached to every Smart Move email
- ✓ **Listing meetings**
Hands you a credible story for the seller's decision
- ✓ **Past client check-ins**
Mail or drop off to homeowners who haven't engaged

What It Looks Like.

THE SMART MOVE — A GUIDE FOR BC HOMEOWNERS

YOUR LOGO HERE

Why a Softer Market is the *Smartest Time* to Upsize

If you already own a home in BC, the shift in the market may be working in your favour — here's what the numbers actually show.

THE CORE IDEA

Most homeowners assume a down market is a reason to wait. In fact, for those looking to upsize, it's often the opposite. When prices drop across the board, the **gap between what you sell for and what you buy narrows** — meaning you get more home for less incremental cost.

This is the **"net move-up advantage"** — and right now in BC, the conditions are particularly favourable for homeowners with equity.

THE MATH, SIMPLIFIED

<i>A Realistic BC Example — Peak vs. Today</i>	
Your current home value (peak)	\$900,000
Dream home price (peak)	\$1,300,000
Gap to bridge — at peak	\$400,000
Your current home value (today, -12%)	\$792,000
Dream home price (today, -12%)	\$1,144,000
Gap to bridge — today	\$352,000
Your net savings by moving now vs. at peak	\$48,000 less to borrow

* Illustrative example only. Based on a hypothetical 12% correction applied equally across price points. Actual results vary by property features, and individual circumstances. Consult your REALTOR® and mortgage advisor for a personalized analysis.

"You lose a little on what you sell — but you save even more on what you buy. That's the smart move."

5 Reasons BC Move-Up Buyers Are Acting Now

- 1 The gap has never been smaller**
In a corrected market, the dollar difference between your current home and your next one shrinks — you get significantly more home for proportionally less incremental debt.
- 2 You have years of equity built up**
Even in a softer market, homeowners who purchased 3–10 years ago carry significant equity — often enough to put 20%+ down on their next home.
- 3 Less competition at the top**
Higher-priced homes see fewer bidding wars in a buyers' market. You have more negotiating power and more time to make the right decision.
- 4 When prices recover, you recover bigger**
A 10% rebound on a \$1.1M home adds more to your net worth than the same rebound on an \$300K home. Upsizing now positions you to benefit more.
- 5 Life doesn't wait for the perfect market**
Growing families, remote work, aging parents — the reasons to upsize are real. The question isn't if you move, it's whether you move at the right moment.

Your Next Three Steps

Step 1 — Know Your Number
Get a current market valuation on your home from your REALTOR®

Step 2 — Run the Move-Up Math
Ask your mortgage advisor for a personalized Upsizer Snapshot showing your real bridging cost

Step 3 — Make the Smart Move
With the right team, the right numbers, and the right timing — move with confidence

[Realtor Name] | [Brokerage Name]
[Phone] | [Email] | [Website]

Ready to explore your move? Let's talk.

For informational purposes only. Not financial, legal, or mortgage advice. Market data is illustrative. Consult a licensed mortgage broker and REALTOR® for advice specific to your situation. All real estate and mortgage services subject to applicable BC regulations.

KEY CONTENT BLOCKS

The Headline

"Why a Softer Market is the Smartest Time to Upsize" — frames the entire campaign in one sentence

The Math, Simplified

Side-by-side BC example: peak vs. today, ending in \$48,000 less to borrow on the same move

5 Reasons They're Acting Now

Gap shrinks · equity intact · less competition · bigger recovery · life doesn't wait

3 Next Steps

Get a valuation · request the Upsizer Snapshot · make the move with confidence

15 Emails, 3 Tiers, 1 Story.

Three parallel 5-email sequences — same story arc, different tone and CTA depending on how warm the contact is. Sending the same email to a past client and a cold open-house sign-in is the most common mistake; this architecture prevents it.

<p>TIER 1</p> <h2>Past Clients</h2> <p><i>Bought or sold with you. They know and trust you.</i></p> <p>TO NE Warm, personal, trusted advisor</p> <hr/> <p>CTA Direct — "let's chat about your numbers"</p> <hr/> <p>BROKER INTRO Email 4 — personal endorsement</p>	<p>TIER 2</p> <h2>Sphere of Influence</h2> <p><i>Colleagues, neighbours, community. They know your name but haven't done business with you.</i></p> <p>TO NE Friendly, professional, community-minded</p> <hr/> <p>CTA Invitational — "here's a resource if you're curious"</p> <hr/> <p>BROKER INTRO Email 4 — community resource framing</p>	<p>TIER 3</p> <h2>Cold / Semi-Warm</h2> <p><i>Open house sign-ins, event contacts, purchased lists. No established relationship.</i></p> <p>TO NE Educational, credible, no assumptions</p> <hr/> <p>CTA Soft — "no pitch, just information"</p> <hr/> <p>BROKER INTRO Email 4 — explained in detail</p>
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The Five-Email Arc.

Each email has one job. Don't stack them. The arc moves from idea → math → story → soft CTA → close, sent over 23 days.

- 1 The Big Idea**
Day 1
Open the conversation — most homeowners think a soft market means wait. It doesn't, if you have equity and want to move up.
- 2 The Math**
Day 5-6
The \$900K → \$1.3M peak-vs-today table. \$48,000 less to borrow on the same move. Numbers speak for themselves.
- 3 Client Story**
Day 10-12
A real BC family who ran the numbers and made the move. Incremental payment: under \$400/month for a significantly better home.
- 4 Soft CTA + My Introduction**
Day 16-19
The Upsizer Snapshot offer. I get introduced as the mortgage partner here — by name, with credentials.
- 5 The Nudge & Close**
Day 23-26
The window won't stay open forever. One last invitation, no pressure, with a graceful exit for non-responders.

How the Three Tiers Differ.

The story is the same. The voice changes. Same email number, three different subject lines and openings — each calibrated to the relationship.

	TIER 1 — PAST CLIENTS	TIER 2 — SPHERE	TIER 3 — COLD/SEMI-WARM
EMAIL 1 SUBJECT	<i>"A quick thought about your home, [First Name]"</i>	<i>"Something worth knowing if you own a home in BC"</i>	<i>"Why BC homeowners are making their move right now"</i>
EMAIL 2 SUBJECT	<i>"The numbers that might surprise you, [First Name]"</i>	<i>"The math behind upsizing in a softer market"</i>	<i>"How a down market actually helps move-up buyers"</i>
EMAIL 4 SUBJECT	<i>"Have you thought about what your home is worth today?"</i>	<i>"Curious what your move-up number actually is?"</i>	<i>"A free tool to show you your real move-up cost"</i>
EMAIL 5 SUBJECT	<i>"One last thing before this window closes..."</i>	<i>"The window won't stay open forever — here's why"</i>	<i>"Is now the right time? Here's how to know."</i>

Note: Email 3 (client story) keeps the same body across tiers but the closing language and CTA tone differ. Emails 2 and 3 are not shown in this table; refer to the actual files.

Eight Pieces for IG, FB & LinkedIn.

Six static post templates and two short-form video scripts — each with caption copy, hashtags, platform-specific notes, and visual direction. Reinforces what's running through email; doesn't replace it.

6

Static post templates — awareness through conversion, every post mapped to a day in the calendar

2

Short-form video scripts — both direct-to-camera and voiceover versions for each, 45-60 seconds

3

Platforms — Instagram, Facebook, LinkedIn, with platform-specific note for each post

Word

Editable document — paste captions into your scheduler, swap in your own images

EACH POST INCLUDES

Caption copy

Ready-to-paste, character-counted

Hashtag bank

BC- and market-specific tags

Platform notes

How to tweak per IG / FB / LinkedIn

Visual direction

What kind of image or graphic works

Post-by-Post Breakdown.

Each piece has a job in the funnel — awareness, education, emotion, conversion, credibility, and timing — sequenced to match the email arc.

- 01 The Big Idea · Awareness**
Day 2
"Most BC homeowners assume a softer market means waiting. Here's what they're missing."
- 02 The Math · Educational**
Day 5
2-slide carousel: peak vs. today, ending on \$48K. Most shareable piece — boost candidate.
- 03 Client Story · Emotional**
Day 10
Real family. Real numbers. Real outcome. The hero post for engagement and DMs.
- 04 Upsizer Snapshot · CTA**
Day 16
DM 'SNAPSHOT' — the conversion post. Mirrors Email 4 going out the same week.
- 05 Objection Buster · Credibility**
Day 19
"I don't want to sell at a loss compared to peak." The reframe. High LinkedIn performer.
- 06 Market Timing · Light Close**
Day 22-23
Calm, confident, not urgency-fear. The window won't stay open forever — but no panic.

Plus: Video 1 — "The Move-Up Math in 60 seconds" (Day 9) · Video 2 — "Is Now the Right Time? 4 Questions to Find Out" (Day 15-16). Both in camera + voiceover versions.

Three Pieces, Three Jobs.

Print earns trust in ways digital doesn't — especially with the homeowner demographic most likely to be a move-up buyer. These three pieces cover the three channels: direct mail, in-hand, and reference.

01

Postcard

5.5" × 4.25" · Two-sided

Direct mail to past clients and farm areas. Front teases the \$48K stat; back delivers the math and your contact.

02

Open House Leave-Behind

Letter · 8.5" × 11" · Single-sided

What homeowners take home from your open houses. Carries the full Smart Move argument as a single takeaway piece.

03

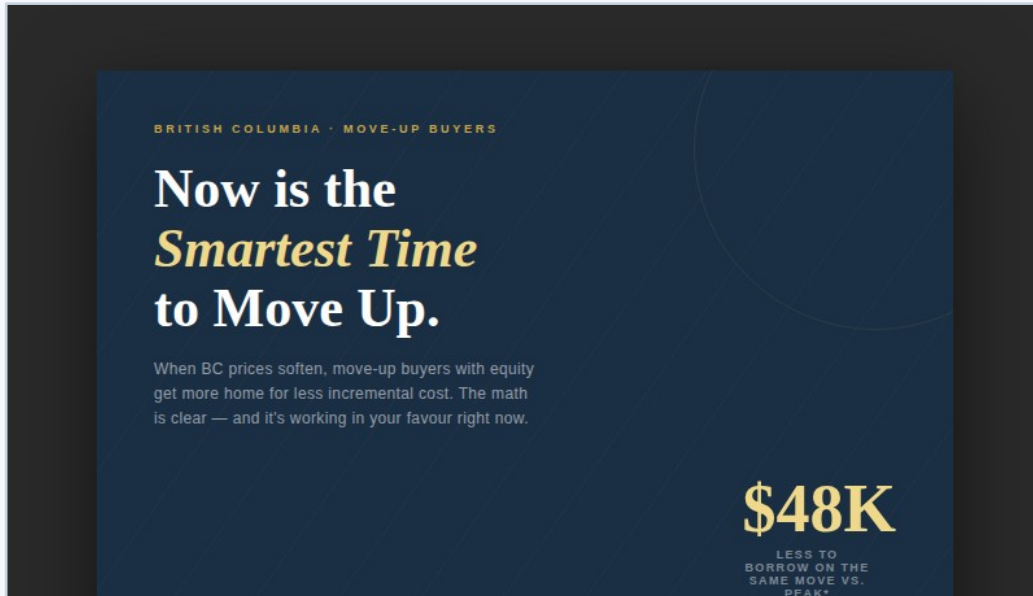
Trifold Brochure

11" × 8.5" · Landscape, two-sided

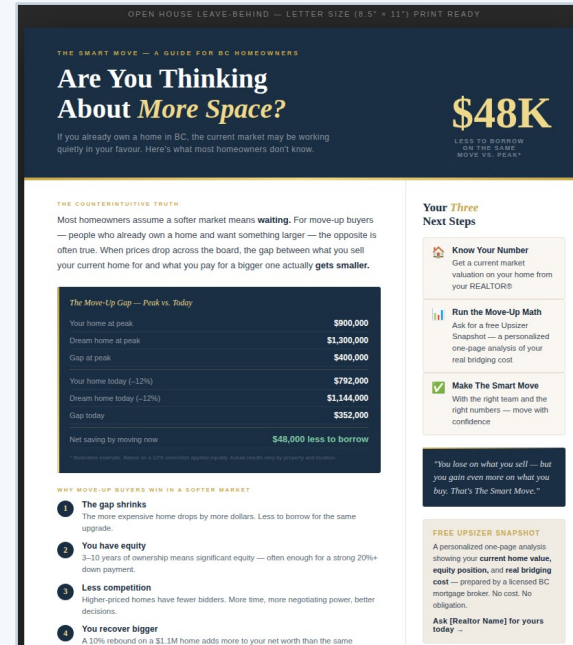
Your reference piece. Outside: objections answered honestly. Inside: the math and the three-step action plan.

Postcard & Leave-Behind.

POSTCARD · 5.5" x 4.25" · DIRECT MAIL



LEAVE-BEHIND · 8.5" x 11"



WHAT TO NOTICE

\$48K is the hero

The big number does the work — everything else supports it.

Math without complexity

The peak-vs-today table says in five lines what an article would take five paragraphs to say.

Snapshot is the soft close

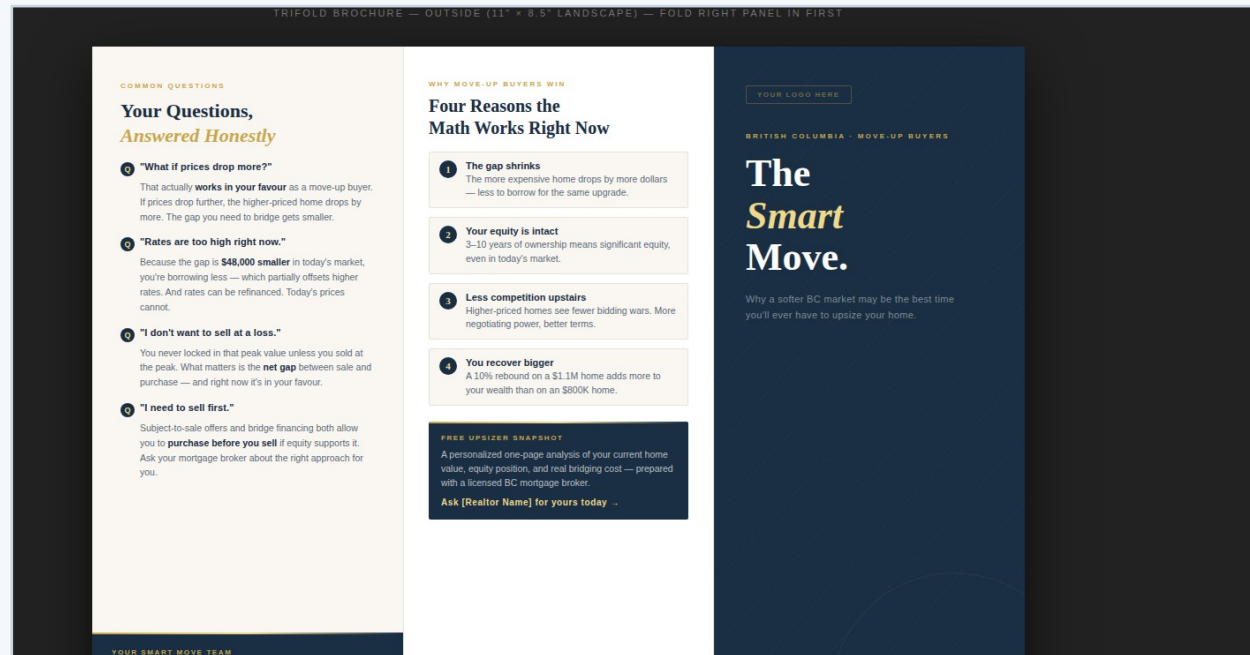
Every piece ends by pointing the reader to request the personalized analysis from you.

Your logo & contact

Each piece has clear space for your branding — swap in your details throughout.

The Trifold Brochure.

TRIFOLD OUTSIDE · 11" × 8.5" LANDSCAPE



Panel 1 — Common Questions, Answered Honestly

Panel 2 — Four Reasons the Math Works

Panel 3 — Cover · "The Smart Move" + \$48K

Inside panels (not shown) carry the move-up math, the three-step action plan, and the Free Upsizer Snapshot offer with your contact details.

Where I Come In.

The Snapshot is the deliverable that turns a curious homeowner into a qualified prospect — and it's the one piece of the campaign that I prepare personally.

A single page, branded with both your name and mine. The realtor refers — I deliver within 48 hours. It contains four numbered sections: their current home, their equity and sale proceeds, their move-up analysis, and what the new monthly payment actually looks like.

1

Your Current Home

Value · estimated peak ·
outstanding mortgage · years
owned · type and location

2

Equity & Sale Proceeds

Sale price minus commission,
mortgage payout, closing costs —
net equity

3

Move-Up Analysis

Target purchase price · down
payment from equity · PTT and
closing · new mortgage required

4

Monthly Reality

Current payment vs. new
estimated payment — the actual
incremental dollar amount

The Actual Template.

UPSIZER SNAPSHOT · PREPARED EXCLUSIVELY FOR
[Client First & Last Name]
 [Current Property Address, City, BC]

Prepared by
 Michael Friedman
 Premier Mortgage Advisement
 Licensed Broker - BC

Date: [Month Day, Year] · Referred by [Realtor Name], [Brokerage] · Valid for: 30 days

CONFIDENTIAL **NO OBLIGATION**

SECTION 1 — YOUR CURRENT HOME

CURRENT VALUE \$[XXX,XXX] <small>Based on current comps in [area]</small>	ESTIMATED AT PEAK \$[XXX,XXX] <small>Approx. peak value [year]</small>	OUTSTANDING MORTGAGE \$[XXX,XXX] <small>Approx. remaining balance</small>	YEARS OWNED [X] Yrs <small>Purchased [year]</small>
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PROPERTY TYPE & LOCATION
 [e.g. 3-Bed Townhouse · Burnaby, BC]

SECTIONS 2 & 3 — EQUITY, SALE PROCEEDS & MOVE-UP ANALYSIS

YOUR EQUITY & SALE PROCEEDS		YOUR MOVE-UP ANALYSIS	
Estimated Sale Price	\$[XXX,XXX]	Target Purchase Price	\$[X,XXX,XXX]
Less: Realtor Commission	-\$[XX,XXX]	Less: Down Payment (equity)	-\$[XXX,XXX]
Less: Mortgage Payout	-\$[XXX,XXX]	Less: Additional Savings	-\$[XX,XXX]
Less: Closing Costs (Sale)	-\$[X,XXX]	PTT + Closing Costs	+\$[XX,XXX]
Net Equity Proceeds	\$[XXX,XXX]	New Mortgage Required	\$[XXX,XXX]

SECTION 4 — WHAT THIS LOOKS LIKE MONTHLY

\$[X,XXX] <small>CURRENT MONTHLY PAYMENT</small>	\$[X,XXX] <small>NEW EST. MONTHLY PAYMENT</small>	+\$[XXX] <small>MONTHLY DIFFERENCE</small>
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Based on 25-yr amortization at 4.75% fixed (30-yr term). P&I only. Property taxes, strata & insurance additional. Rate subject to qualification. Contact Michael Friedman for your personal rate book.

OVERALL ASSESSMENT

The Math Works in Your Favour

Based on your equity position, current BC market conditions, and target purchase price, upsizing now is financially viable — and more favourable than waiting for recovery.

KEY NUMBERS AT A GLANCE

Equity available	\$[XXX,XXX]
Down payment %	[XX]%
New mortgage	\$[XXX,XXX]
vs. bridging at peak	-\$[XX,XXX]
Monthly increase	+\$[XXX]/mo
CMHC insurance?	[Yes / No]

BC MARKET CONTEXT

The [area] market has softened approx. [X]% from its [year] peak. At your target price point this represents a \$[XX,XXX] **absolute dollar reduction** — greater than your current home's drop — creating a clear net advantage for move-up buyers.

YOUR NEXT STEPS

- Rate Hold** — Contact Michael to lock in a rate. Protects you for [90/120] days while you search.
- Home Search** — Connect with [Realtor Name] to begin viewing in your target range and area.

WHAT YOUR CLIENT RECEIVES

One page. Their numbers. Their decision.

Co-branded with your name as the referring realtor and mine as the preparing broker. Includes valid-for date (30 days), confidential badge, and "No Obligation" stamp so the client knows exactly what this is — and what it isn't.

48 hr turnaround

From the moment you send me the referral details

Co-branded

Your name and mine — every Snapshot, every client

Always free, always one page

No obligation, no upsell, no commitment to use me

How the Handoff Works.

Five steps from the moment a lead raises their hand to the moment you sit down with them to review their numbers. The whole process is designed to keep you central to the relationship — I prepare the analysis, you present it.

1

Lead Responds

Client replies to your email or calls asking about the Snapshot.

2

You Collect Info

Use Script D — current home area, year purchased, target price range.

3

Pass to Michael

Email or text me the same day with the client details.

4

Snapshot Prepared

I prepare the one-page PDF within 48 hours and send it back to you.

5

Review Together

You present the Snapshot to the client — in person or video call.

Send Snapshot referrals directly to Michael

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48-hour turnaround

Six Segments. One Campaign.

Everything is designed to interlock. Email warms the contact, social reinforces, print earns trust in physical hand, the toolkit tells you when each piece fires, and the Snapshot converts curiosity into a real conversation.

01

Toolkit

Your operating manual

HTML + Word

03

Email Sequence

15 emails · 3 tiers

HTML + Plain Text + Word

05

Print Collateral

Postcard · leave-behind · trifold

PDF + HTML

02

Core One-Pager

The anchor explainer

PDF + HTML

04

Social Pack

6 posts + 2 video scripts

HTML + Word

06

Upsizer Snapshot

Broker-prepared, 48hr turnaround

PDF (I prepare)

Your First Week.

Six things, before Day 1. Don't skip any of them — each one is foundational. You can be live in seven days.

1 Sort your contacts into tiers.

Past clients → Tier 1. Colleagues, neighbours, community → Tier 2. Open house sign-ins and purchased lists → Tier 3. When in doubt, tier down.

3 Personalize the brackets.

Fill in every [bracket] — your name, brokerage, phone, website, local price points, your real client story. Generic emails get ignored.

5 Print the one-pager.

Have at least 25 copies ready for open houses and client meetings before your first email goes out.

2 Choose your email platform.

Mailchimp, Constant Contact, Follow Up Boss, or kvCORE all work. Use plain text or Word format for personal Gmail or Outlook sends.

4 Confirm the Snapshot process with me.

Call or email me before launch to align on referral intake, turnaround time, and how the Snapshot will be delivered back to you.

6 Schedule social posts.

Use the 30-day calendar to plan your first two weeks in advance. Batch on a Sunday. Save yourself daily decisions.

OPEN FLOOR

Questions?

Tell me what would make this work for you — what's missing, what you'd want to adjust, what your first ten clients to receive this look like.

Michael Friedman

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