



Low-barrier approach. High-potential results.

Rocket's next opportunity in integrated insurance with Branch

Branch was built with our members in mind to bring simplicity, affordability, and ease to a complicated process—just like Rocket Mortgage. With these shared values, together we've created a streamlined client experience that multiplies growth, profit, and mission. The proof? Our most recent play boasts a **30% conversion rate and 85% retention**.

What's next?

- Pilot campaign to 200K currently serviced clients
- Four emails over eight weeks
- Measurable results and analysis
- Branch pays \$100K pilot fee to Rocket

With Rocket's existing API integration with Branch and no licensing requirements, partnership has never been easier.



Step 1:
Rocket API integrates with Branch



Step 2:
Branch provides marketing and creative assets with Rocket approval



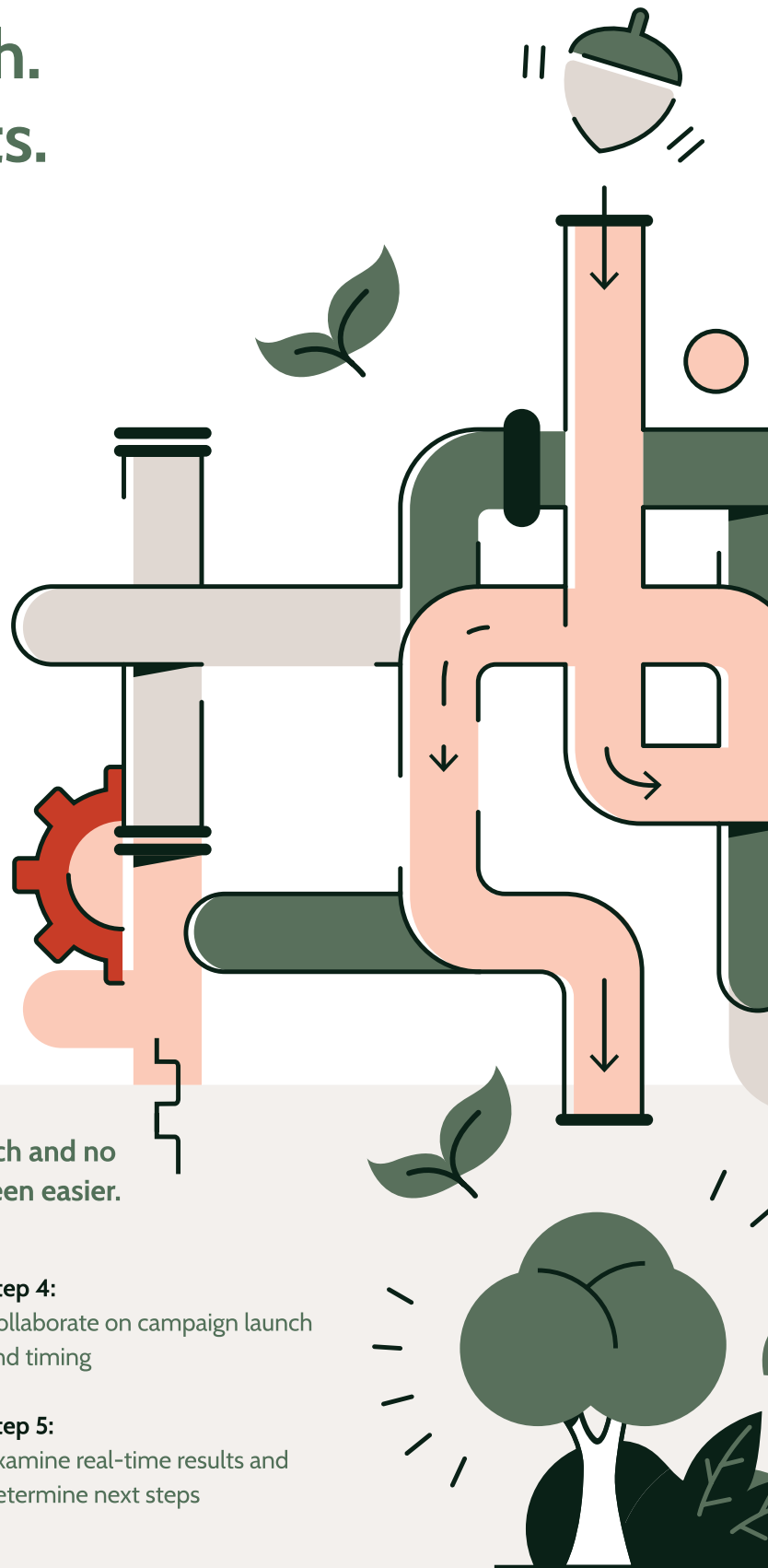
Step 3:
Rocket identifies target clients



Step 4:
Collaborate on campaign launch and timing



Step 5:
Examine real-time results and determine next steps



Big value. Minimal effort. Ease for everyone.

The market opportunity in launching Rocket Insurance Agency—with Branch support on licensing and appointments.



\$1.4B long-term cash

With 2.5M clients and an assumption of 4% annual penetration over ten years, Rocket would generate \$1.4B of long-term cash flow with Branch.

\$40M profit in the first twelve months

Email marketing GTM: Monthly emails, beginning with clients expected to achieve the greatest savings by switching.

- 1.75% penetration of Rocket's servicing book in year one
- Rocket resources: Copywriter and email implementation specialist. Branch does the rest.

Servicing platform integration: API integration that creates personalized and bindable offers to clients.

- 1.75% penetration of Rocket's servicing book in year one
- Rocket resources: BA, developer, and designer needed for 1–3 months

Servicing contact center integration: Surfacing best opportunities to agents to save clients money.

- 0.5% penetration of Rocket's servicing book in year one
- Rocket resources: Agent training

Double client lifetime expectancy

Branch's ability to deliver bundled prices in seconds means we provide savings and ease to the 78% of American households who want to bundle their insurance. That also means Branch's expected client lifetime is double that of typical servicers—12 years instead of five or six. With Branch's bundling capabilities and exclusive discounts for Rocket clients, our partnership creates even more savings opportunities for mutual clients while eliminating traditional friction from the insurance and mortgage-buying process. It's how we encourage customer growth and loyalty.

