




GET A BETTER
MORTGAGE
CONTENT PLANNER



Section 1: Define Your Brand Identity

(Check the box that best fits your goal)

- The Friendly Guide – Approachable, supportive, and easy to talk to
- The Expert Advisor – Professional, knowledgeable, and data-driven
- The Problem-Solver – Creative, strategic, and solution-oriented
- The Financial Coach – Educator, mentor, and trusted resource
- The Community Connector – Relationship-focused and people-first
- Other: _____

 **Tip:** Describe yourself in one sentence ➔ *Example: "I help first-time homebuyers feel confident about their mortgage decisions by providing expert guidance with a personal touch."*



GET A BETTER
MORTGAGE
CONTENT PLANNER



Step 2: Develop Your Brand Voice & Tone

How do you want clients to feel when they interact with your brand? *(Choose up to 3!)*

- Confident
 - Empowered
 - Educated
 - Reassured
 - Inspired
 - Informed
 - Supported
-

What tone best represents your brand? *(Choose up to 2!)*

- Professional but friendly
- Authoritative and expert-driven
- Conversational and engaging
- Fun and lighthearted
- Motivational and inspiring

Write one sentence in your brand voice, ie; explaining mortgage pre-approval to a client:



GET A BETTER
MORTGAGE
CONTENT PLANNER



Step 3: Key Messaging Framework

- **Your Elevator Pitch:** (One sentence that summarizes who you help and how!)
 - Example: "I specialize in helping self-employed individuals and first-time buyers secure the right mortgage with ease and confidence."

- **Your Brand Tagline:** (A short phrase that sums up your unique value!)
 - Example: "Stress-Free Mortgages. Expert Guidance."

- **Three Core Messages Your Audience Should Always Remember About You:**

- 1.
- 2.
- 3.

- **Words & Phrases to Use Frequently:** (What represents your brand best?)

- Example: "Smart home financing," "personalized mortgage solutions," "secure your dream home"

- 1.
- 2.
- 3.



GET A BETTER MORTGAGE CONTENT PLANNER



- **Words & Phrases to Avoid:** (*What doesn't fit your brand voice?*)
 - Example: "Cheap mortgage," "one-size-fits-all financing," "we guarantee approval"
- 1.
 - 2.
 - 3.
-

Step 4: Consistency Across Platforms

How will your brand voice sound across different channels? (Fill in the blanks!)

- **Social Media**
 - (*Example: "I want my social media content to feel conversational and educational while providing real, actionable advice."*)

"I want my social media content to feel _____ and _____ while providing _____."

- **Email & Client Communication**
 - (*Example: "My emails will be professional but still warm and approachable."*)

"My emails will be _____ but still _____ and _____."

- **Website & Marketing Materials**
 - (*Example: "My website should make visitors feel confident and help them take the next step in their mortgage journey."*)

"My website should make visitors feel _____ and help them _____."



GET A BETTER
MORTGAGE
CONTENT PLANNER



Step 5: Real-Life Application

Rewrite the following sentences in **YOUR** brand voice!

- “Call me today for your mortgage needs.”


Your Rewrite:

- “Rates are changing, don’t miss out!”

Your Rewrite:

- “Apply now for fast mortgage approval

Your Rewrite:

 **Tip:** Stick to this branding and voice to maintain consistency! Practice with as many sentences as you need to feel clear in your voice.
