




GET A BETTER MORTGAGE CONTENT PLANNER



Step 1: Define Your Social Media Goals

Who Are You as a Mortgage Agent? (Check all that apply or write your own!)

- Increase brand awareness
- Boost engagement (likes, comments, shares)
- Generate leads or sales
- Drive website traffic
- Build a community
- Other: _____

 **Tip:** Your content should align with your main goal. Example: If you want engagement, focus on interactive posts like Q&As and polls.

Step 2: Identify Your Target Audience

Who is your ideal follower? (Age, interests, location, profession)

Example: First-time homebuyers aged 25-35, located in Canada, interested in financial planning.

My audience:

What problems do they have that your content can solve?

Example: They struggle with understanding mortgage rates.

My audience's struggles:



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Step 3: Choose Your Content Formats

(Select 1-3 formats you will focus on)

- Reels/Short Videos - *Best For Engagement, Virality*
- Carousels (Swipe Posts) - *Education, Tutorials*
- Single Image Posts - *Branding, Quotes*
- Stories - *Quick updates, Polls*
- Text-Based Posts (Quotes, Threads, tweets) - *Thought leadership*
- Live Videos - *Real-Time engagement and updates*
- Blog Articles - *Long-form educational content, market updates & explanation*
- Other: _____

 **Tip:** Mix formats for variety! Ex: Use a Reel to summarize a blog post.

Step 4: Choose Your Platforms

(Select 2-3 platforms based on where your audience is most active)

- Instagram
- TikTok
- Facebook
- LinkedIn
- X (Twitter)
- YouTube
- Other: _____

 **Tip:** Align your platforms with your preferred content type.

- ❖ Video-heavy content? Focus on TikTok & Instagram Reels!
 - ❖ Text/Blog content? Focus on X/Twitter, LinkedIn, and IG Carousels
 - ❖ Audio/podcast content? Focus on Reels, TikTok & YouTube videos
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Step 5: Define Your Content Pillars (Topics)

(Pick 3-5 recurring topics that align with your brand)

- Education** – Home-buying tips, mortgage terms explained
- Social Proof** – Client testimonials, success stories
- Engagement** – Polls, Q&A, behind-the-scenes
- Sales & Promotions** – Special Lender offers, service highlights
- Lifestyle & Trends** – Moving tips, home decor ideas
- Personal Interests:** *{Pick 2-3 for a well rounded consistent approach}*
 - Interest 1*
 - Interest 2*
 - Interest 3*



My Content Pillars:

1. _____
2. _____
3. _____
4. _____
5. _____



Tip: Stick to these pillars to maintain consistency!



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Step 6: Create Your Posting Schedule

(How often will you post on each platform?)

Platform	Frequency	Content Type
<i>Ex; Instagram</i>	<i>3 times per week</i>	<i>2 Reels + 1 Carousel</i>

Tip: Start small (3-4 posts per week) and scale up based on engagement.

Step 7: Plan Your First Week of Content

(Fill out your first week's content plan and repeat for monthly content planning)

Day	Platform	Post Type	Topic	Goal
Monday	<i>Ex; Instagram</i>	<i>Single image</i>	<i>Testimonial</i>	<i>Position myself as a leader in service</i>
Tuesday				
Wednesday				
Thursday				
Friday				

Tip: Use a scheduling tool like Meta Business Suite or Later to plan ahead.



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Step 8: Take Action

Now that you've built your content plan, commit to posting consistently for 30 days and track your progress!

Final Step: Track & Adjust Your Strategy


(After a week or month, review your results!)

Which posts performed best?

What type of content got the most engagement?

What should I do more of?

What should I change?

 **Tip:** Analytics from Instagram Insights, Facebook, and TikTok can show your best-performing content.
