



# The Broker Brand Checklist

with **Christian Stevens**



## Branding as a Broker

**Branding is not optional anymore.**

Branding and marketing aren't "nice to have" - they sit at the centre of a modern brokerage or broker.

**Being good is no longer enough.**

Even the best product or advice is irrelevant if nobody knows who you are.

**The next generation of winning brokers will:**

- Build trust
- Establish authority
- Create reach at scale
- And clearly own a niche

**Personal brand ≠ vanity content.**

Done properly, personal branding is a lead-generation, trust building, and positioning engine.

**Content + strategy + consistency = transformation.**

Results don't come from one viral post - they come from aligned messaging, repeatable systems, and showing up consistently.

**Mentorship and positioning matter.**

High-performing brokers sharpen their positioning and lean into their strengths, rather than copying generic industry content.

**The opportunity for brokers is massive.**

Brokers who combine expertise with powerful branding will significantly outperform those who don't.

Brand isn't what you say once - it's what the market hears consistently. If people don't know you, they can't choose you. ”



# Broker Brand Checklist

## Positioning & Niche

- Can you clearly explain who you help and why you're different?
- Do you own a specific niche, not just "home loans"?
- Is your messaging consistent across LinkedIn, Instagram, website, and email?

*Winning brokers own their niche - they're not trying to speak to everyone.*

## Trust & Authority

- Do you regularly share insights that demonstrate expertise (not just listings or rate updates)?
- Are you educating, not selling, in your content?
- Would a stranger trust you after consuming your content for 60 seconds?

*Trust is built before the first conversation.*

## Visibility & Reach

- Are you consistently visible where your clients spend time online?
- Do you have a repeatable content rhythm (not sporadic posting)?
- Are you building reach intentionally, not relying on referrals alone?

*The best advice in the world doesn't matter if nobody hears it.*

## Content Strategy

- Does your content reinforce your positioning and strengths?
- Are you creating content that attracts "hot" leads, not just likes?
- Are you clear on what action you want people to take after consuming your content?

*Content should move people closer to working with you.*

## Consistency & Leverage

- Are you delegating to create leverage and time to focus on your brand?
- Is branding something you do weekly - not when business slows?
- Are you treating brand-building as a long-term asset, not a campaign?

*Consistency beats intensity every time.*

## ABOUT WINGMAN GROUP

Australia and New Zealand's fastest-growing offshoring provider.

Are you using your offshore team to their full potential? Read our **Broking Offshore Task List**.

# MORTGAGE BROKING OFFSHORE TASK LIST

## LOAN PROCESSORS

Data Entry	Lodgement	Settlement
<b>CRM Data Entry</b> to ensure all client data from supporting documents is correct, and that all supporting documents are saved.	Lodge deals via Apply Online.	<b>Prepare Discharge Forms.</b>
<b>Documents Saved</b> with the correct file name and within the correct subfolder.	<b>Liaise with Lender/Assessor</b> to ensure they are satisfied with all the documents and are prepared to offer the loan to the client	<b>Prepare Lender Forms</b> and send to client for signing.
<b>Send Compliance Documents</b> to be signed by the Client. Includes the Credit Guide, Privacy Statement, and Credit Proposal.	<b>Update the Client every 2-3 days on how their application is progressing.</b>	<b>Liaise with Client Solicitor and Lender Solicitor</b> to coordinate settlement
Populate <b>lender application</b> forms accurately from broker notes or client fact-finds.	<b>Validate figures</b> entered in the lender serviceability calculator against the broker's notes.	<b>Confirm Settlement</b> and Loan information with the Client.
	Double-check lender portal.	Update status to "Settled".
		Prepare settlement instruction sheets or checklists for broker review.

## CUSTOMER CARE

Client Onboarding	Maintenance	Adhoc Requests
<b>Confirm Loan Details with Client</b> including that linked accounts are set up correctly, credit cards have been received, ensure internet banking is working, confirm repayment frequency and amounts.	<b>Conducting Annual Reviews</b> and checking pricing with their current lender on the anniversary of the loan.	<b>Generating reports</b> (e.g. pipeline, settlement, or commission summaries).
<b>Point of Contact for Client</b> moving forward (unless the client requires additional lending, in which case the Broker gets involved).	<b>Fixed Interest &amp; Interest Only Expiries</b> , ensuring the client's loan doesn't default to an uncompetitive rate.	Supporting the onboarding of new brokers or team members by setting up access, file structures, and trackers.
Enter or update client contact details, referral source, and deal owner.	<b>Construction Loan Drawdown Requests</b> , organising on behalf of the client with the lender.	Following up with lenders on progress draws, valuation status, or loan documentation delays.
	Populate rate-reduction or repricing request forms for broker submission.	Submitting <b>bank account detail changes</b> or repayment frequency amendments to lenders.

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## CREDIT

### Loan Structure & Package

**Assess client scenario** to determine the most suitable lender options based on policy, servicing, and loan structure.

**Work closely with the broker** to structure the deal effectively

**Calculate servicing capacity** and recommend the most viable product options

**Compare loan products** and rates across multiple lenders based on broker guidance.

**Rename files** according to lender naming conventions.

### System & Documentation

**Review and verify client data** within the CRM and lender platforms.

**Complete internal checklists** and submit comprehensive deal notes for seamless processing.

Conduct **regular data hygiene** checks - ensuring inactive or duplicate records are archived or merged correctly.

Ensure all data entered into CRMs and trackers aligns with the brokerage's workflow stages (e.g. "Onboarding," "Lodged," "Settled").

### Post Submission

**Liaise with lenders** for scenario clarification.

**Manage any credit critical follow-up** and escalate urgent matters to the Broker

Notify the broker once all **conditions are satisfied** and ready for final approval.

**Update checklists** for each condition and assign follow-up tasks (e.g. valuation, updated statements, insurance).

Maintain updated copies of conditional approval letters.

## OTHER SUPPORT

### Administration

Ordering **settlement gifts**.

Managing **calendars** and **inboxes**.

Send confirmation emails or SMS reminders for appointments.

**Organise digital files** and maintain naming consistency across systems.

Track post-meeting and post-call notes.

### Marketing

Manage email marketing contacts and **send monthly newsletter**.

Use Canva templates to create and **post social media tiles** and stories.

Assist with sourcing relevant **content for social media** e.g (articles, RBA updates).

**Send Google review** requests to recently settled clients.

### Operations

**Prepare slide decks** or visual dashboards for internal reporting meetings.

Assist with onboarding or offboarding brokers or RPs.

Record lender SLAs, rate updates, and policy changes in shared tracker.

**Prepare weekly "Pipeline Snapshot" reports** (settlements, pre-approvals, lodgements).



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