



LinkedIn

Optimize, Post, Connect: LinkedIn for Mortgage Brokers

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#4378429748



YOUR PRESENTER



Kelly South

*Director of Wholesale Content
and Communications*

<https://www.linkedin.com/in/kellysouth0714/>

Marketing Director with 20+ years of experience in financial services, mortgage, and B2B/B2C marketing, including 10 years in the reverse mortgage industry.

AGENDA

- Why Social Media?
- Profile Tips
- Content Best Practices
- Networking Tips
- Navigation
- Selling Index

WHY SOCIAL MEDIA?

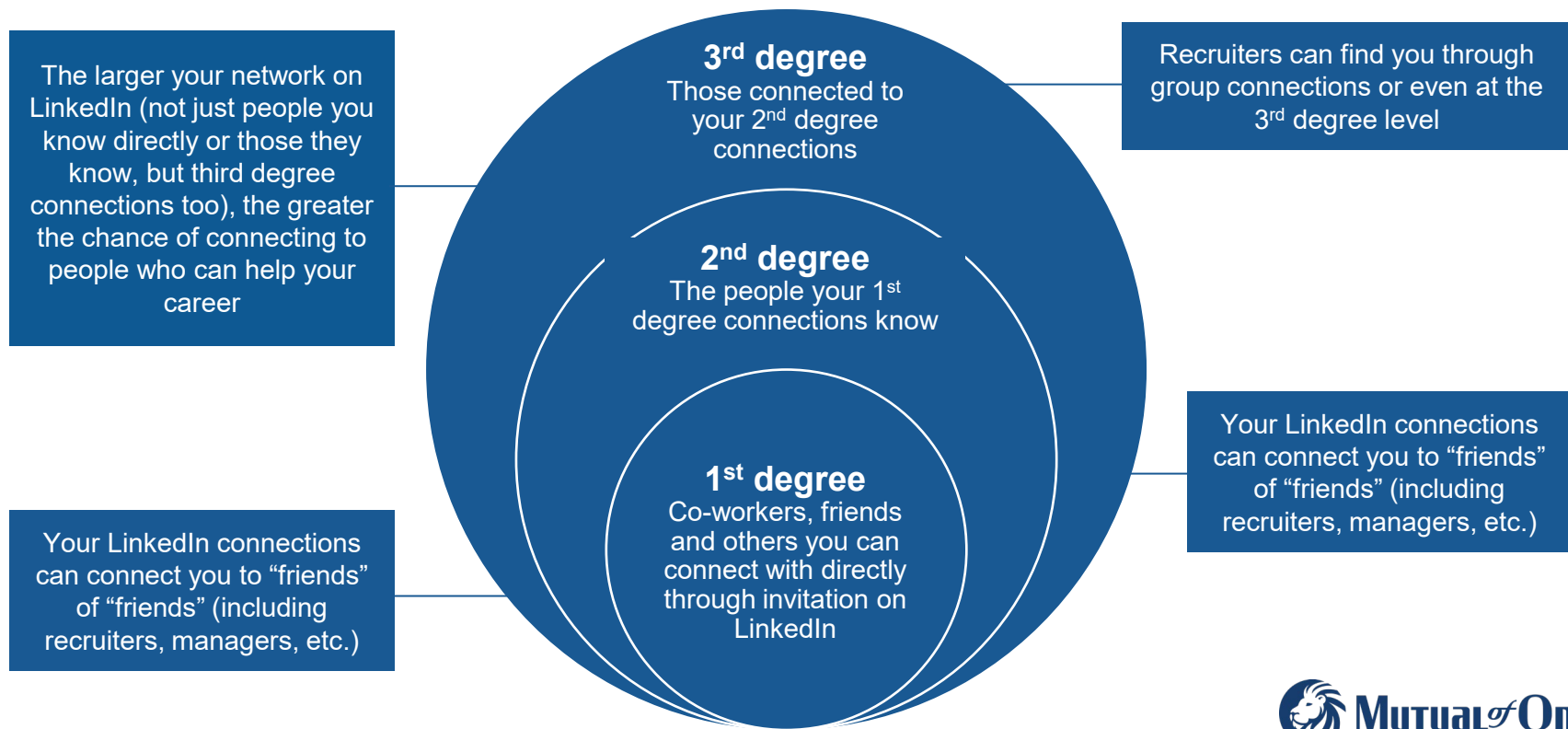
SOCIAL MEDIA INSIGHTS

- LinkedIn is the **largest** professional network. More than **1 billion members** worldwide, with decision-makers across nearly every industry.
- **94%** of B2B marketers say building trust is the most important factor for business success.
- **LinkedIn for Business Development**
 - Networking today
 - Increase validation and reduce doubt
 - Research tool
 - Approximately 67 million companies have a presence on LinkedIn – meaning businesses are actively using the platform to network, hire, and share content.

UNDERSTANDING YOUR AUDIENCE

Social media is a relationship-building tool, **not a direct sales tool!**

THE 3 DEGREES OF SEPARATION



PROFILE TIPS

Follow LinkedIn's lead!

PROFILE TIPS

- This is your first impression
- Populate all key sections
- This is not an online resume – add personal touches!



Pro tip:

Use a personal email account you will always have access to. If you originate, refer to LinkedIn Job Aid for required pieces of information.

PROFILE TIPS



[Home](#) [My Network](#) [Jobs](#) [Messaging](#) [Notifications](#) [Me](#) [Sites](#) [Try Premium for free](#)

MG&C, get started on LinkedIn with 3 easy steps:



Your profile is missing one detail

Add work start date in 'MG&C MG&C'. Add atatir v

Month

Year

Save



Build your network

Connect with colleagues, classmates, and other people you know to start building your profesal network.

Connect



Stay in the know

Follow industry experts to stay updated wthe latest in your field.

Follow

Managed File Transfer · Schedule transfers between OneDrive, Google Drive, Dropbox, Box, FTP, SFTP · Ad —



MG&C MG&C
0 connections

Add profile section.

View profile

Ructaazb Accessibility Help Center
Privacy & Terms

Share an article, photo, video or idea

Write an article

Image

Video

Post



Test Job
1st connection: Santa Monica, California

Testing the character limit

1

Comment

Share

Trending hashtags  mesw/vees



Find your next opportunity

Discover jobs that fit your experience.

Update your profile

People you may know

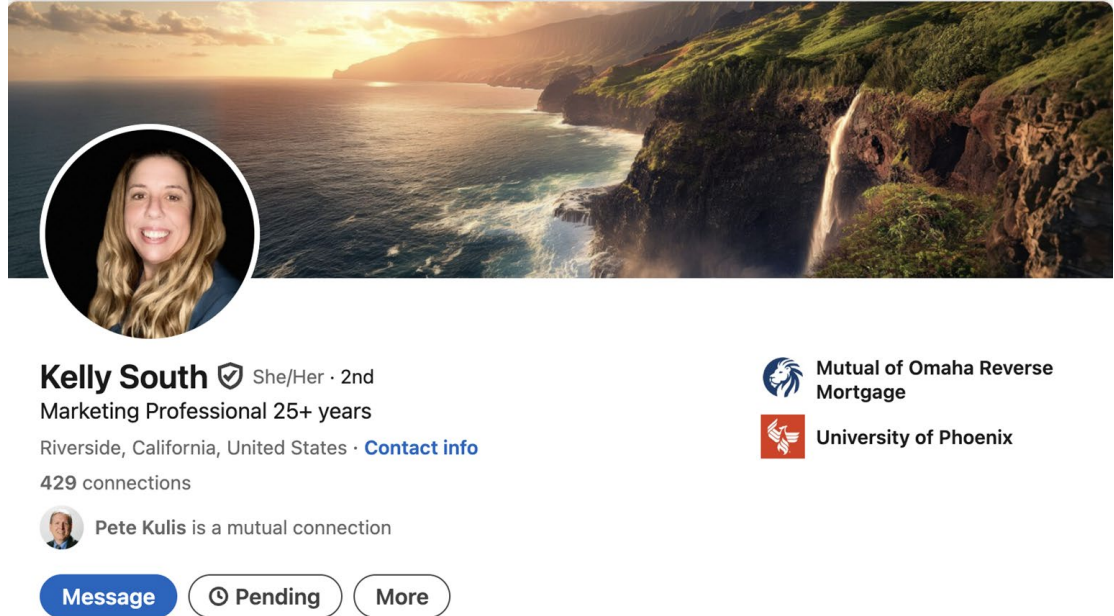
Trending hashtags

About Ads Center Ad Choices

10

PROFILE TIPS

- Adding a profile photo increases profile views 21X and increases credibility
- Add LinkedIn header image



A screenshot of a LinkedIn profile for Kelly South. The profile features a circular profile picture of a woman with blonde hair, a header image of a coastal sunset with a waterfall, and a background image of a coastal sunset. The profile text includes the name 'Kelly South' with a verified badge, gender 'She/Her', years '2nd', title 'Marketing Professional 25+ years', location 'Riverside, California, United States', a 'Contact info' link, and '429 connections'. Below this is a mutual connection notification for Pete Kulis. At the bottom are three buttons: 'Message', 'Pending', and 'More'. To the right of the profile are logos for 'Mutual of Omaha Reverse Mortgage' and 'University of Phoenix'.

Kelly South ✓ She/Her · 2nd
Marketing Professional 25+ years
Riverside, California, United States · [Contact info](#)
429 connections

 Pete Kulis is a mutual connection

[Message](#) [Pending](#) [More](#)

 Mutual of Omaha Reverse Mortgage
 University of Phoenix

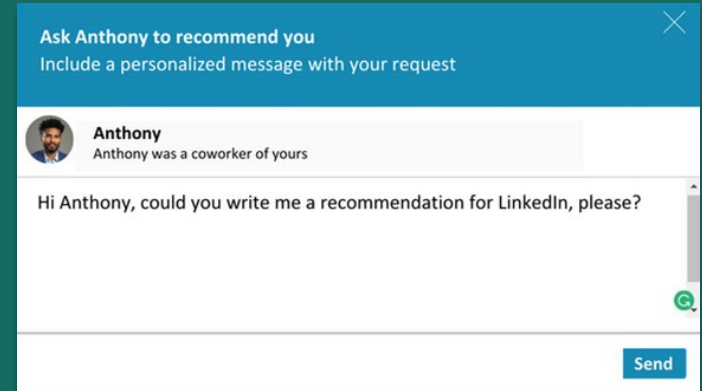
PROFILE TIPS: SKILLS & RECOMMENDATIONS

- **Goals**
 - Up to 17x more views with 5+ skills listed
 - Search benefit, visibility
 - Build trust, credibility
 - Strengthen relationship (business partners)



Pro tip:

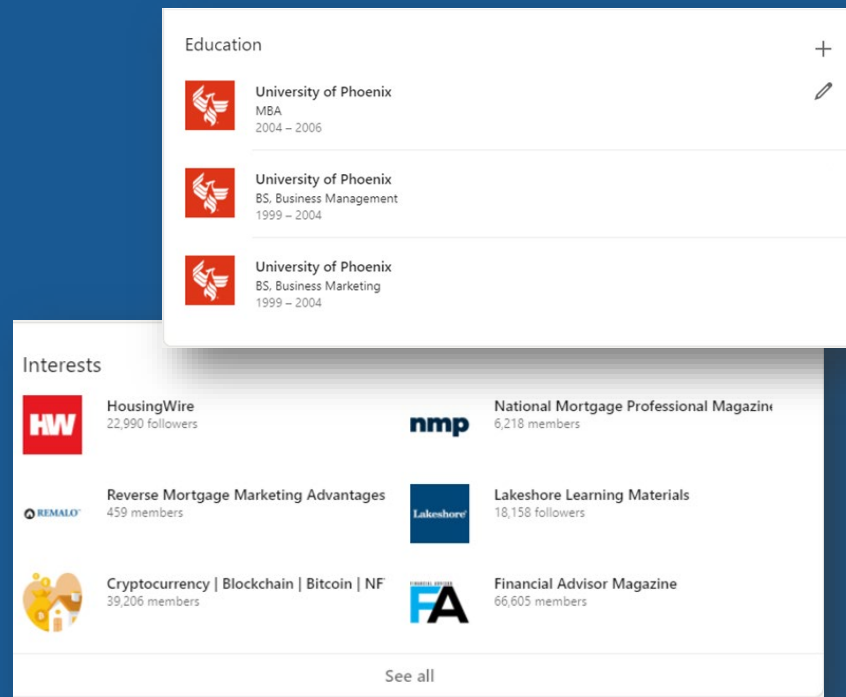
Convert positive email to a recommendation.
Ask co-workers and business partners to recommend you on LinkedIn.



PROFILE TIPS: EDUCATION & INTEREST

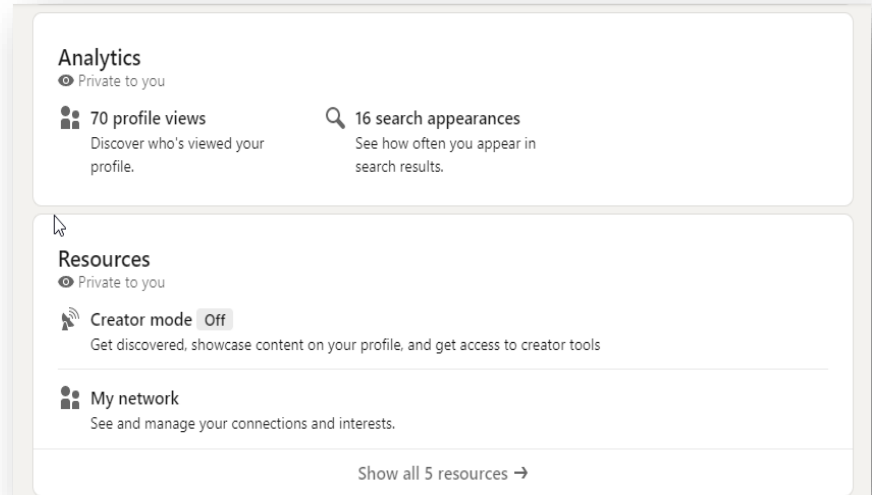
- **Goals**

- Leverage to build commonalities and as ice breaker
- Certifications, training
- Indicator of subject matter expert
- Don't forget to add volunteering, associations, memberships



PROFILE TIPS: SUCCESS!

- Accomplishments
- Validated who you are to business partners
- Headshot, summary, education experiences
- Increased your chance of being found by search
- Headshot, summary, endorsements, recommendations
- Laid groundwork to bond over shared experiences
- Education, experience, volunteering
- Provided opportunity for follow-up
- You can see who views your profile!



CONTENT BEST PRACTICES

Keep it compliant!

CONTENT BEST PRACTICES

- Content required – this is how you engage
- Know what you're linking to
- What will your business partners find valuable/interesting?
- Stay clear of hot-button issues, like politics
- Confer with your legal and compliance departments for requirements and company policies



Pro tip:

People can see what posts you have liked, so stay away from engaging with hot button issues!

CONTENT BEST PRACTICES

- **Where to find content:**
 - Mutual of Omaha Reverse Mortgage Social Pages
 - Your company's LinkedIn page/YouTube channel
 - News articles and other media
- **Reminder:**
 - Please consult your legal/compliance department with any questions about content compliance

NETWORKING TIPS

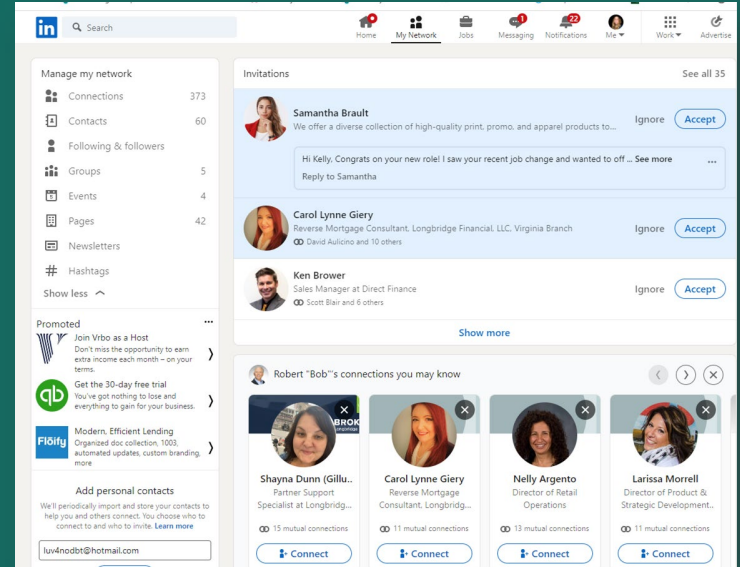
Let's get connected!

NETWORKING TIPS: MY NETWORK

- Great place to start when getting connected
- Sync personal email to find connections
- See who your connections are connected to



Pro tip:
To find similar profiles, sync
your personal email



10 ADVANCED LINKEDIN STRATEGIES TO EMPOWER YOUR NETWORKING



Tag Others

Highlight people and organizations in your posts to increase your reach.



Offer to Make Introductions

Consider introducing your connections to each other prior to events.



Be Generous

Provide update that help your peers obtain new jobs and grow their networks.



Contact New Connections

Call your new connections after accepting their invitations.



View Connections in Reverse

Review your oldest connections first to renew your existing relationships.



Publish Consistently

The advantage of LinkedIn's publishing platform to repurpose your content.



Leverage LinkedIn Filters

Target your connections more effectively by filtering them.



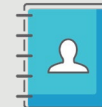
Engage Alumni

Prior to trips and events, contact and try to meet alumni.



Meet Group Members

Study the membership lists of your LinkedIn groups and send strategic and connection requests.



Perfect Your Profile

Revisit your profile regularly to ensure accuracy and enjoy automated update notifications.

NAVIGATING

Let's go to LinkedIn!

LinkedIn search results for "mortgage".

Navigation tabs: People, Jobs, Companies, Groups, Posts, Courses, Schools, Events, All filters.

Online MBA at UC Davis - Get connected to career opportunities in Silicon Valley. 24-h

People

- Armando Bon** • 2nd
Mortgage Professional II at Mr. Cooper
Orange County, CA
Summary: ...facilitating, training and processing successful **mortgage** loans and **mortgage** loan originators. My commitment...
Kelly Rogers, Reza Jahangiri, and 8 other shared connections
- Heather Pettit** • 2nd
Mortgage Lending
Huntington Beach, CA
Past: Mortgage Professional at American Advisors Group - ...the reverse **mortgage** industry. According to Reverse **Mortgage** Insight (2015) AAG is ranked as the top...
Shawn OBrien is a shared connection
- Amanda Derse** • 2nd
Reverse Mortgage Processing
Orange County, CA
Past: Senior Loan Processor at American Advisors Group - Processor for the national field sales, reverse **mortgage** division. Specializing in customer service...
Ted Zepfel, Jacquelyn Le, and 5 other shared connections

See all people results

Jobs

- Mortgage Loan Processor**
Kind Lending
Santa Ana, California, United States • Remote
Actively recruiting
7 hours ago • Easy Apply
- Wholesale Account Executive**
Carrington Wholesale Lending
Anaheim, California, United States
1 alumnus works here

NAVIGATING

- Search by keyword or #hashtag, company name, etc.

NAVIGATING – GROUPS

- Set up notifications

Manage notifications

Manage notifications from National Mortgage Professional Magazine

☐ All new posts
Get notified about all new posts in this group

☒ Highlights
Get notified about posts from people you may know

☐ No new posts
Only get notified about activity involving you

Save

The screenshot shows the LinkedIn interface for the 'National Mortgage Professional Magazine' group. At the top, the navigation bar includes the LinkedIn logo, a search bar, and icons for Home, My Network, Jobs, Messaging, Notifications, Me, Work, and Advertise. The group header features a profile picture of Kelly South, who joined the group in August 2018, and a banner image with the 'nmp' logo. The group has 6,216 members, and there is an 'Invite connections' button. Below the header, there are sections for 'Recent' posts, 'Groups' (listing related groups like 'National Mortgage Profession...' and 'Financial Advisor Magazine'), 'Events' (listing 'Funding Senior Care with Hom...' and 'A Case Study: Advanced Plann...'), and 'Followed Hashtags'. The main content area shows a post by David Colwell, Executive Vice President at Lender Price, with a video link and a 'Web Link' to a webinar. Below this is a post by Maddie Hughes, Marketing Coordinator at Top of Mind Networks, mentioning a webinar. On the right side, there is an 'About this group' section stating it is an extension of the National Mortgage Professional Magazine, and an 'Admins' section listing Andrew Berman (Owner), Alison Valvo (Manager), and Melissa Pianin (Manager).

NAVIGATING – PEOPLE

- Sort and filter results to fine tune

The screenshot shows a LinkedIn search for 'mortgage' with approximately 1,820,000 results. The 'People' filter is selected, and a sidebar on the right shows active filters: 'Connections' (1st, 2nd, 3rd+), 'Locations' (California, United States), 'Current company' (Bank of America), and 'Past company'. The main list displays profiles of mortgage professionals, including Armando Bon, Heather Pettit, Amanda Darse, Chirag Patel, Carlos Zepeda, and Jason Lyon, each with a 'Connect' button.

NAVIGATING – PEOPLE

- Create search alert and get notified as new results become available
- Set it and forget it!

The screenshot shows the LinkedIn search interface for the term "mortgage". The top navigation bar includes icons for Home, My Network, Jobs, Messaging, Notifications, Me, Work, and Advertise. Below the search bar, filters are applied: "People", "Connections 2", "United States 1", and "Bank of America 1". The search results show "About 19,000 results". A banner for the "CFP® Certificate Program - UCI – Certified Financial Planning Program. Prepare to Sit for CFP® Exam." is displayed. The results list includes:

- Celeste Barajas** • 2nd
Assistant Vice President, Mortgage Loan Officer
Ontario, CA
Current: Assistant Vice President, **Mortgage** Loan Officer at Bank of America
Diana Passow is a shared connection
- Maggie Golden** • 2nd
AVP, Corporate Mortgage Underwriter at Bank of America
Orange County, CA
Current: AVP, Corporate **Mortgage** Underwriter at Bank of America
Ted Zepfel is a shared connection
- Chuck E. Ibrahim** • 2nd
President at North America Mortgage, Inc.
Orange County, CA
Past: ...**Mortgage** | Norwest **Mortgage** | WMC **Mortgage** | Weyerhaeuser **Mortgage** Company
Jeff Walton and David Aulicino are shared connections
- Richard Pohl** • 2nd
Managing Director, Mortgage Banking Accounting at Countrywide Home Loans
Altadena, CA
Current: Managing Director, **Mortgage** Banking Accounting at Countrywide Financial Corporation
Martin Govaerts is a shared connection
- Eric Johnson** • 2nd
President at US Mortgage Investments
Minneapolis, MN
Current: President at US Mortgage Investments • We are an independent boutique **mortgage** firm...
Jeff Walton is a shared connection
- Brandon Sciumbato** • 3rd+
SVP at Countrywide Mortgage
Simi Valley, CA

On the right side, there is a "Saved searches" section with a "Create search alert" button. Below that is an advertisement for "Advocacy by Investment" with a "Request Free Demo" button.

SELLING INDEX

Let's see how we measure up!

SOCIAL SELLING INDEX

- Get your score free!
- Measure how effective you are at establishing your professional brand, finding the right people, engaging with insights, and building relationships. It is updated daily.

The screenshot shows the LinkedIn Sales Solutions website with a navigation bar containing 'Products', 'Compare Plans', 'Resources', 'Partners', and a 'Contact sales' button. The main content area features a dark background with the text 'Measure your sales success with Social Selling Index' and 'Sales Navigator can boost your Social Selling Index by 20%'. Below this are two buttons: 'Learn more' and 'Get your score free'. On the right, a person is holding a laptop displaying the 'Social Selling Dashboard' for Noah Gold, a VP of IT at SolarSlash. The dashboard shows a Social Selling Index score of 62 out of 100, represented by a circular gauge. It also displays two bar charts: 'Establish your professional brand' (4% vs 43%) and 'Find the right people' (16% vs 25%).

LinkedIn Sales Solutions

Products Compare Plans Resources Partners Contact sales

Measure your sales success with
Social Selling Index

Sales Navigator can boost your Social Selling Index by 20%

Learn more Get your score free

Social Selling Dashboard

Noah Gold
VP of IT at SolarSlash

4% Industry SII Rank 43% Network SII Rank

Social Selling Index - Today
Your Social Selling Index (SII) measures how effective you are at establishing your professional brand, finding the right people, engaging with insights, and building relationships. It is updated daily. [Learn more](#)

62 out of 100

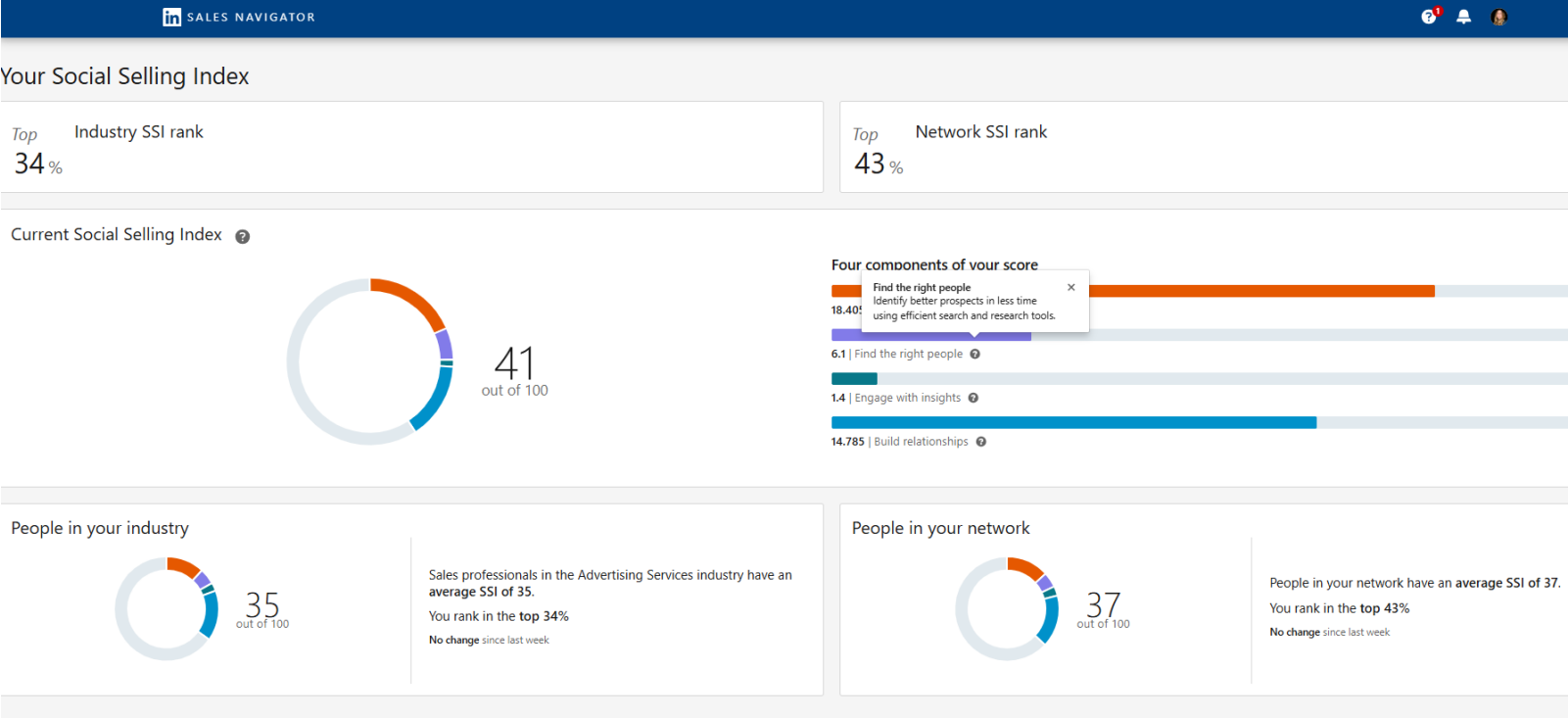
Establish your professional brand 4% 43%

Find the right people 16% 25%

Engage with insights 16% 25%

Build relationships 16% 25%

SOCIAL SELLING INDEX



SUMMARY

- Think about how you want to present yourself and follow through
- Use LinkedIn to track your network
- Work smarter, not harder, by setting up alerts and notifications
- Stay visible on your network and stay aware of what your connections are doing
- Be strategic with your content sharing
- Connect with us:
<https://www.linkedin.com/company/mutualreversewholesale/>



Q & A

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Borrower must occupy home as primary residence and remain current on property taxes, homeowner's insurance, the costs of home maintenance, and any HOA fees.

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