

ADVISER VS ADVISER: STANDING OUT IN THE CROWD

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Trusted Finance



TRANSFER OF TRUST

- In 2021, I started creating content on social media to generate leads for my own mortgage brokerage
- After six months I gained 10,000 followers and was generating 30 leads a week
- Transitioned to generating leads for other brokers
- Over the next three years: my following on Facebook, Instagram, TikTok and Snapchat grew to over 1.5 million people
- I now generate between 500–700 leads organically every week, with \$0 ad spend
- Over \$1 billion in settled loans for my Australia-wide mortgage broker referral partners

STANDING OUT IN THE CROWD

- Building Your Brand Online
- The Three Pillars of Content Creation
- Four Tools to Supercharge your Content Marketing
- Using Your Existing Assets to Build Trust
- Creating Evergreen Content
- Driving Traffic to Your Website
- Capturing Online Leads



PROVIDING YOU WITH VALUE

- My goal is to teach you all of the strategies I have learned while building Trusted Finance
- I only have 60 minutes.
- As soon as you think of a question, write it down.
- I will be available to answer your questions during the morning tea session after my presentation.
- Learn all about your business and discuss how we can work together to build your brand online.





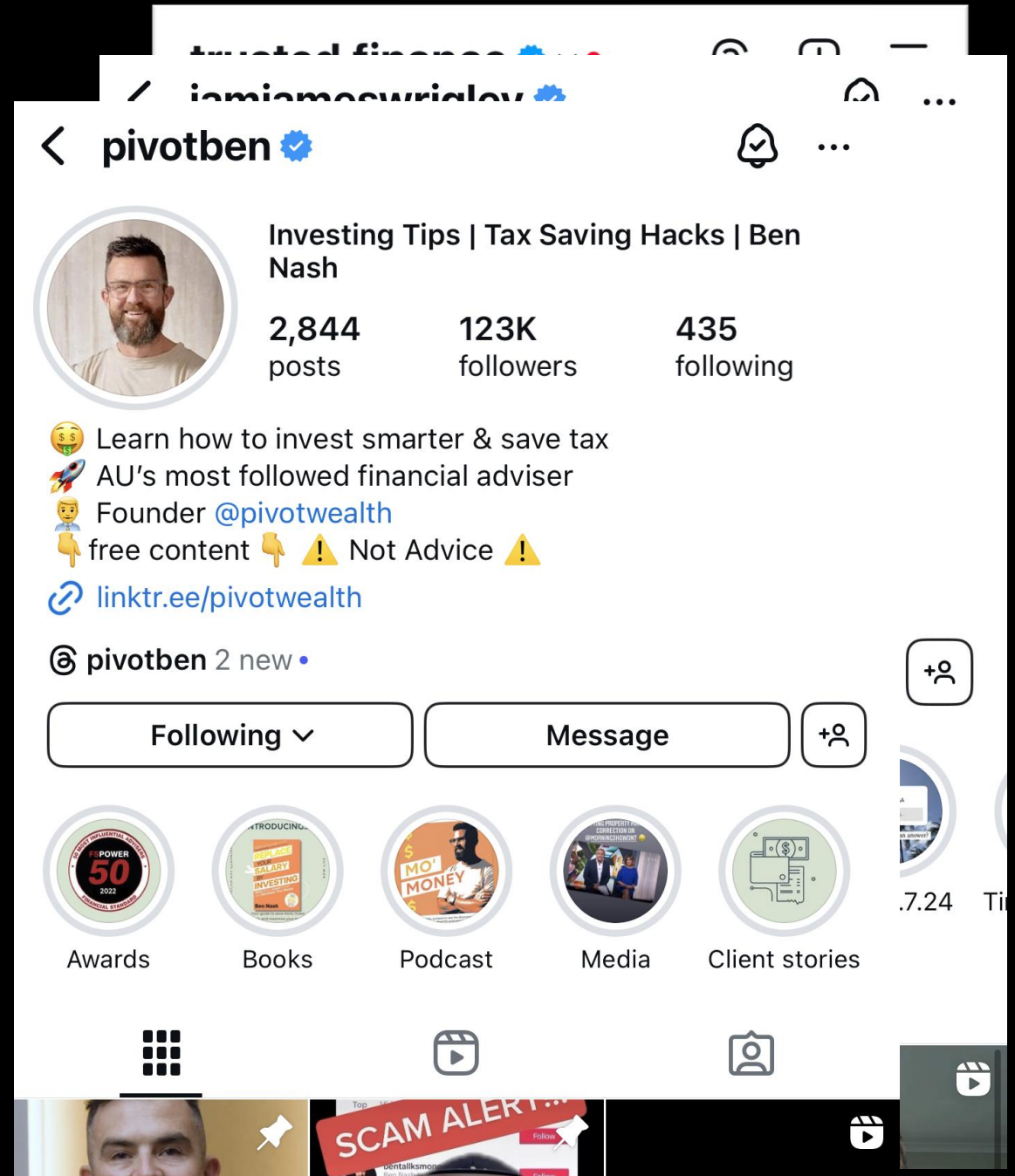
BUILDING YOUR BRAND ONLINE

WHY IS SOCIAL MEDIA IMPORTANT?

- The cheapest, most efficient way to market is through social media.
- Through each platforms “For You” pages, your content can reach millions of customers.
- Your videos should push viewers to your profile.
- To maximise leads your content should be posted across all platforms.

OPTIMISING YOUR SOCIAL MEDIA PROFILES

- Your profile pages on Facebook, Instagram and TikTok should operate as a sales funnel.
- Who are you?
- What do you offer?
- Who is it for?
- Call to action
- Website link



KEY PERSON OF INFLUENCE

- To gain market share you need to build a personal brand.
- Daniel Priestley has developed a framework for becoming a “Key Person of Influence” regardless of your industry or niche.
- The 5 Ps can be used to enhance your authority and visibility within an industry

Pitch: Describe what you do and why it's valuable.

Publish: Create content about what you do and why it's valuable.

Product: Deliver value consistently in a scalable way.

Profile: Be known, liked and trusted in your market – become an expert.

Partnerships – collaborate with other well-known brands to reinforce trust.

WHO IS YOUR IDEAL CUSTOMER?

- Your target market should inform your brand.
- Who are you trying to speak to?
- What type of financial advice do they require?
- REMEMBER: If you speak to everyone you resonate with no one.

CREATING YOUR ONLINE PERSONA

- Your business's online presence needs a face and a personality that speaks to your ideal customer.
- I created “Robbo – The Aussie Mortgage Guy”, a laid back but informative version of my personality pitched to first home buyers.
- Your personal brand can evolve as your target market widens or changes.

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THE THREE PILLARS OF CONTENT CREATION

THREE PILLARS OF CONTENT CREATION

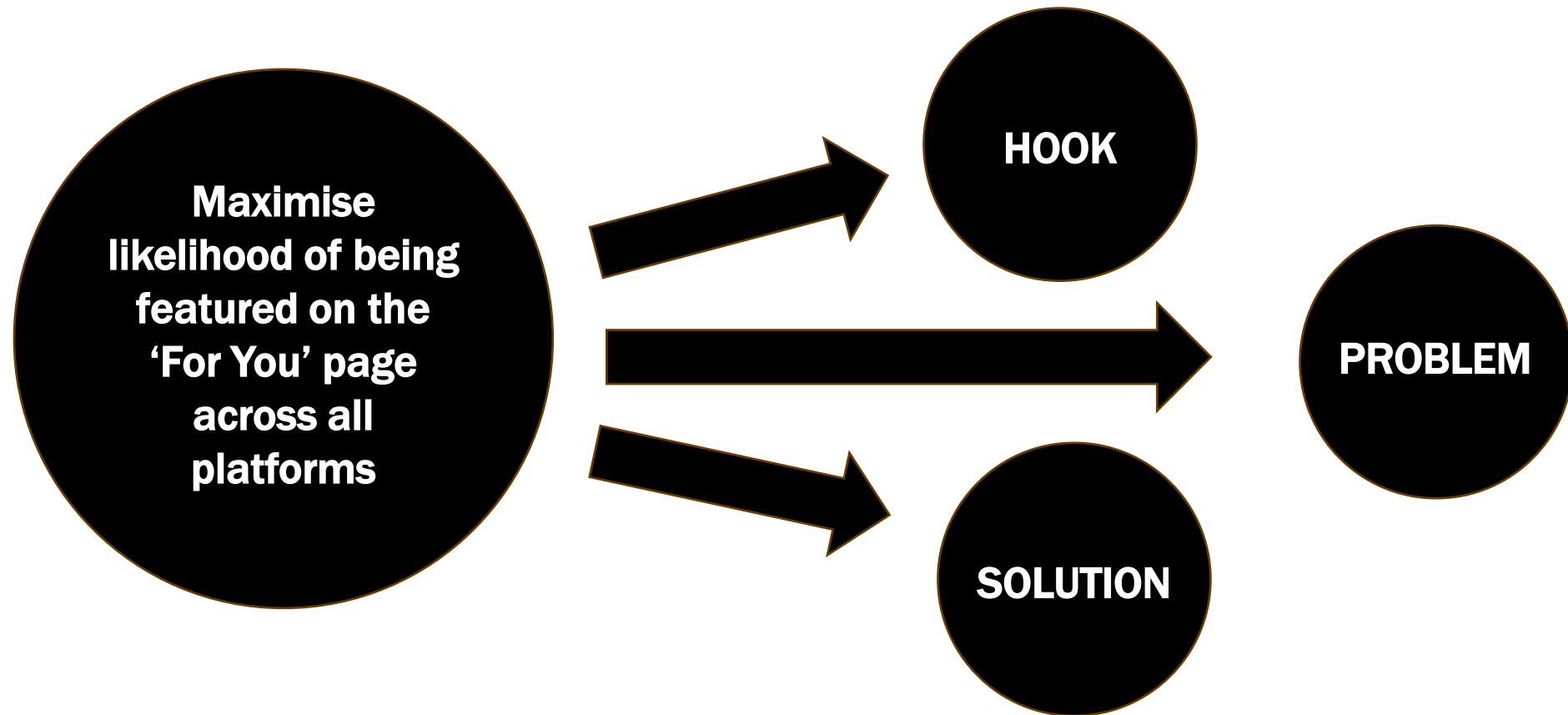


EDUCATIONAL

ENTERTAINING

INSPIRATIONAL

EDUCATIONAL CONTENT



PROVIDING VALUE

- If you provide the most value you will gain the most attention.
- Think about your existing customer journey:
 - What types of questions do they ask?
 - What are they stressed about?
 - What are they excited about?
- Educate on social media in the same way.



ENTERTAINING CONTENT

- Use this content to showcase your personality
- Are you the type of person a customer will want to work with?
- Create relatable content
- Don't be afraid to have a laugh with it all
- Contextualise your content to the products you offer

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INSPIRATIONAL CONTENT

- Your viewers won't remember everything you teach them in your educational content
- They will remember how you made them feel
- One of my goals is to inspire people to take control of their home ownership goals so they can successfully provide for their families
- Inspirational content like this reminds your viewer you share similar aspirations





FOUR TOOLS TO SUPERCHARGE YOUR CONTENT MARKETING

STOP MAKING EXCUSES!

- You do not need a high-end camera. Just use your phone.
- You do not need a specialized microphone. Just use your phone.
- You do not need a ring light. Just stand near a window.
- You do not need a tripod. Just use your hand.

TOOL 1: YOUR PHONE

- Your phone has everything you need to create content.
- Professional looking, hyper edited content doesn't look authentic.
- Make sure your camera is clean, you record in a quiet location with natural light if possible.
- Let me show you how it's done.

PIECE TO CAMERA ON THE GO

- Record one sentence at a time.
- It doesn't need to be perfect, but it does need to be clear.
- Add captions within your preferred app (Facebook, Instagram or TikTok) to give more people with value.
- Don't be afraid to tell a story.




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BEHIND THE SCENES


- Over 112,000 views on TikTok (over 400,000 across all socials)
- Over 5,000 interactions (likes, comments, shares and saves to favourite)
- Generated over 150 Leads
- Picked up by mainstream media further solidifying me as a key person of influence.

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Gen Z FIFO tradie's brutal \$300,000 'blunder' exposes major trap: 'Hard pill to swallow'

A 23-year-old pulling in \$175,000 per year suffered a big shock when he realised what was holding him back.





Stewart Perrie · Senior Journalist
10 January 2025 · 5 min read




Australians Over 50 Are Rushing to Claim This – Here's Why

Ad · Quote Genie






Financial adviser Robbo Roper cautioned young FIFO workers on salaries from splashing their cash without thinking about their future. (Source: TikTok/Getty)



[Young Aussie workers](#) pulling in [big salaries](#) have

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TOOL 2: CAMERA APP

SAME TOOL USED DIFFERENTLY

- It can be daunting creating a talking head piece of content like the examples I've already shared.
- Instead, you can use video content you've filmed prior, unrelated to financial advice.
- This might a video you've recorded while walking the dog, sitting at your desk or while on holiday.
- The trick is how you use text to provide value to your ideal customer.

BANK OF FOOTAGE

- Film videos of around 30 seconds when out and about.
- These can be cut down to your desired length.
- Make the video shorter in length than it takes to read the text.
- This will maximise your content engagement.

If you and your partner can
save \$154 each per week:

In 6 months you'll
have \$8,008

In 1 year you'll
have \$16,016

In 2 years you'll
have \$32,032

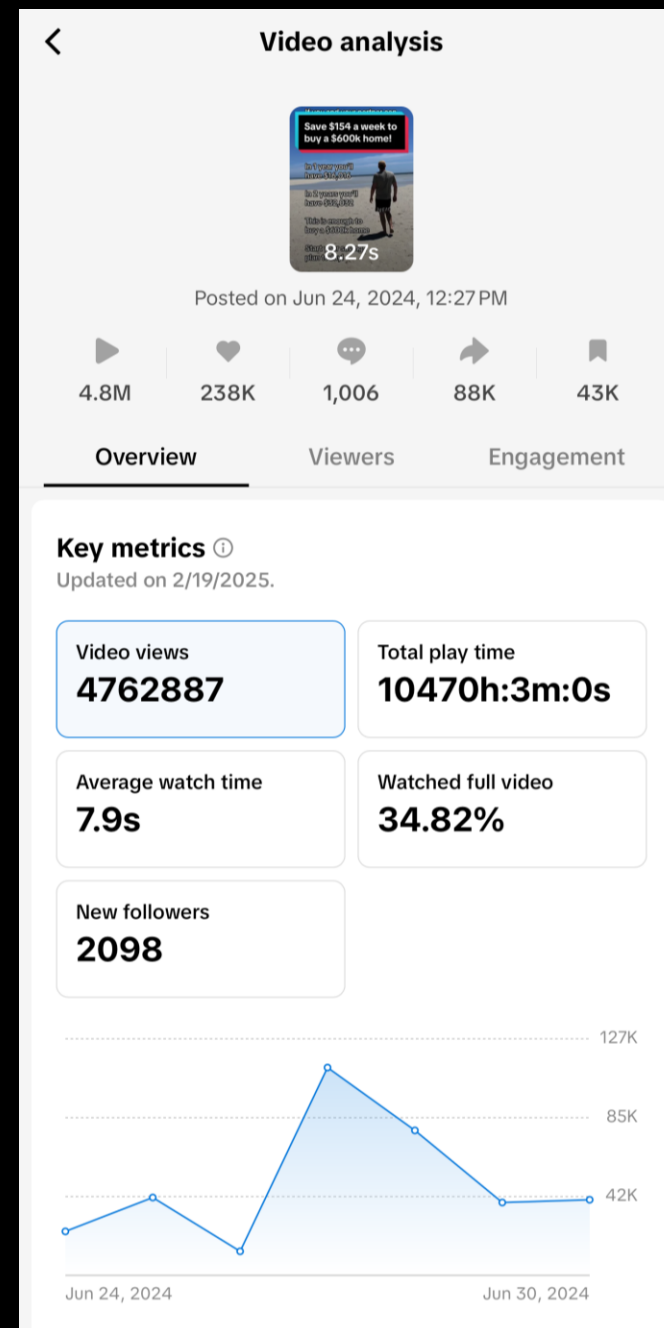
This is enough to
buy a \$600k home

Start your savings
plan today!



BEHIND THE SCENES

- Over 4.8 million views on TikTok alone (over 7 million across all platforms)
- Over 350,000 interactions from TikTok alone – most importantly 88,000 shares.
- Generated over 2,000 new followers
- Generated over 500 Leads



TOOL 3: CAPCUT – FREE APP

- You can combine multiple videos as well as shorten or zoom in on videos
- Create entertaining financial advice related memes.
- Extract the audio from one video and use in another video.
- Generate animated and engaging video captions.

FREE EDITING TOOL

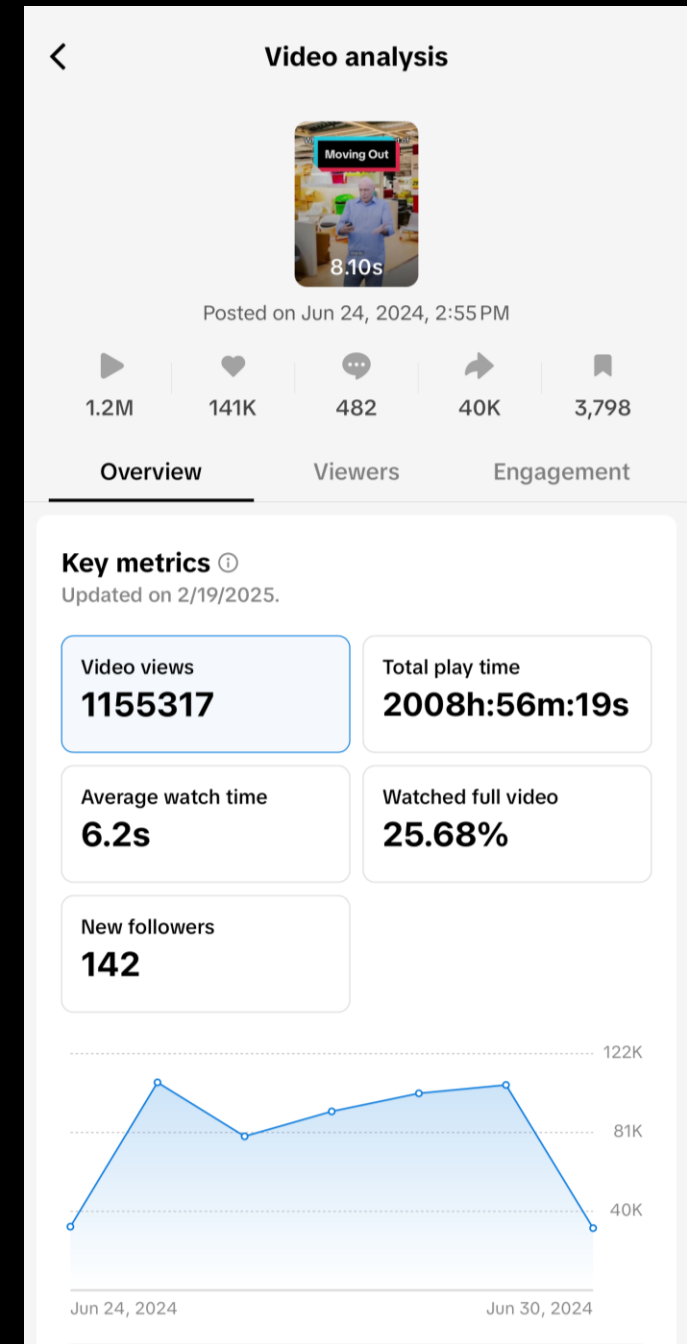
- Capcut integrates with TikTok.
- If you find suitable meme while scrolling you can open it as a “template” in capcut.
- Then you can contextualise the meme to your audience.
- Your audience will remember how you make them feel.



BEHIND THE SCENES

- Over 1.2 million views on TikTok alone.
- Over 141,000 likes and 40,000 shares.
- Showcases a sense of humour
- Took less than 2 minutes to create and another 3 minutes to post across all platforms.

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TOOL 4: SCHEDULING SOFTWARE

- Scheduling software allows you to create content in bulk then organise for it to be posted at some point in the future.
- For Instagram and Facebook I use “Meta Business Suite” (FREE).
- For TikTok and Youtube I use Loomly (\$32 a month).
- Creating a consistent daily posting schedule will drive engagement.

CONTENT CREATION CALENDAR

loomly
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Trusted Finance ▾ | 📅 Month ▾ | 🗒️ | 💬 | 📊 | 💡
< May 2024 >
New Post ▾ | 📄 | 👤 | ⌚ | ⚙️

| Mon | Tue | Wed | Thu | Fri | Sat | Sun |
|--|---|---|--|---|---|---|
| <div>29</div> <div>its ok to drive a beat up car duet ● Scheduled Impact of Car Loan</div> <div>script to save on interest home loan ● Scheduled Manage Mortgage</div> <div>buy invest prop with 3% ● Scheduled Investment Property</div> <div>quad shot caps meme ● Scheduled Meme</div> <div>You better lower your tone ● Scheduled First Home Buyer</div> <div>toddler bathwater ● Scheduled Meme</div> | <div>30 + Add Post</div> <div>believe in your kids 9:00 AM ● Scheduled Fatherhood</div> <div>social battery running out 10:30 AM ● Scheduled Meme</div> <div>invest with 3% deposit skit 12:00 PM ● Scheduled Investment Property</div> <div>stepping back into market 1:30 PM ● Scheduled First Home Buyer</div> <div>Buy existing home fhg push 3:00 PM ● Scheduled First Home Buyer</div> <div>receipts timelines uber eats addition 4:30 PM ● Scheduled Meme Savings</div> | <div>1</div> <div>mortgage hack to save thousands 9:00 AM ● Scheduled Manage Mortgage</div> <div>uber driver get in fixed rate 10:30 AM ● Scheduled Meme Refinance</div> <div>buy with 3% invest talking head 12:00 PM ● Scheduled Investment Property</div> <div>moonlight 27k for 500k home 1:30 PM ● Scheduled First Home Buyer Savings</div> <div>buy with fhg even if not first home 3:00 PM ● Scheduled First Home Buyer</div> <div>saw power tools 10 minutes 4:30 PM ● Scheduled Meme</div> | <div>2</div> <div>parent guarantor talking head 9:00 AM ● Scheduled Parent Guarantor</div> <div>payrise impact on bp 10:30 AM ● Scheduled First Home Buyer Savings</div> <div>bp too low skit invest 12:00 PM ● Scheduled Investment Property</div> <div>viewer review customer options 1:30 PM ● Scheduled Manage Mortgage Veiver Review</div> <div>build co living in mind fhg friend push 3:00 PM ● Scheduled Building Home First Home Buyer</div> <div>2 week notice meme 4:30 PM ● Scheduled Meme</div> | <div>3</div> <div>pay off cc vs home loan 9:00 AM ● Scheduled Savings</div> <div>buy 600k with 32k heavy text coochi pink 10:30 AM ● Scheduled First Home Buyer</div> <div>investment property skit interstate 12:00 PM ● Scheduled Investment Property</div> <div>age of first home buyer 1:30 PM ● Scheduled First Home Buyer</div> <div>building benefits vs buying established 3:00 PM ● Scheduled Building Home</div> <div>i know you're lyin 4:30 PM ● Scheduled Parent Guarantor</div> | <div>4</div> <div>worst thing is get a car loan 9:00 AM ● Scheduled First Home Buyer Impact of Car Loan</div> <div>Still broke af 10:30 AM ● Scheduled Meme Savings</div> <div>Invest with 3% talking head 12:00 PM ● Scheduled Investment Property</div> <div>sydney home buyer 1 mill budget 1:30 PM ● Scheduled First Home Buyer Meme</div> <div>buy 600k home birds eye walkthrough 3:00 PM ● Scheduled First Home Buyer</div> <div>what's for dinner? 4:30 PM ● Scheduled Meme</div> | <div>5</div> <div>building process talking head 9:00 AM ● Scheduled Building Home</div> <div>Discounted SAO's 10:30 AM ● Scheduled Meme</div> <div>invest with 3 per cent skit use equity 12:00 PM ● Scheduled Investment Property</div> <div>realtor wife zaps multiple offers 1:30 PM ● Scheduled Meme</div> <div>buy existing home coffee cups 3:00 PM ● Scheduled First Home Buyer</div> <div>quite alcohol heavy text 4:30 PM ● Scheduled Fatherhood</div> |



USING YOUR EXISTING ASSETS TO BUILD TRUST

WHAT DO YOUR CUSTOMERS SAY?

- You can use any type of previous customer feedback to build trust with your potential customers. These can be in the form of:
 - Google Reviews
 - Website testimonials
 - Emails to you or any of your staff
 - Text messages
 - Direct Messages sent on Facebook, Instagram or TikTok
 - Comments on any of posts across all platforms
 - Comments about you left on other peoples posts

CREATING CONTENT WITH EXISTING ASSETS

- Screenshot a review as soon as you see it and transfer to a specific file on your phone.
- Use a trending song to amplify engagement.
- Film a short video or use existing footage of around 7seconds.
- Insert screenshot as a “sticker”





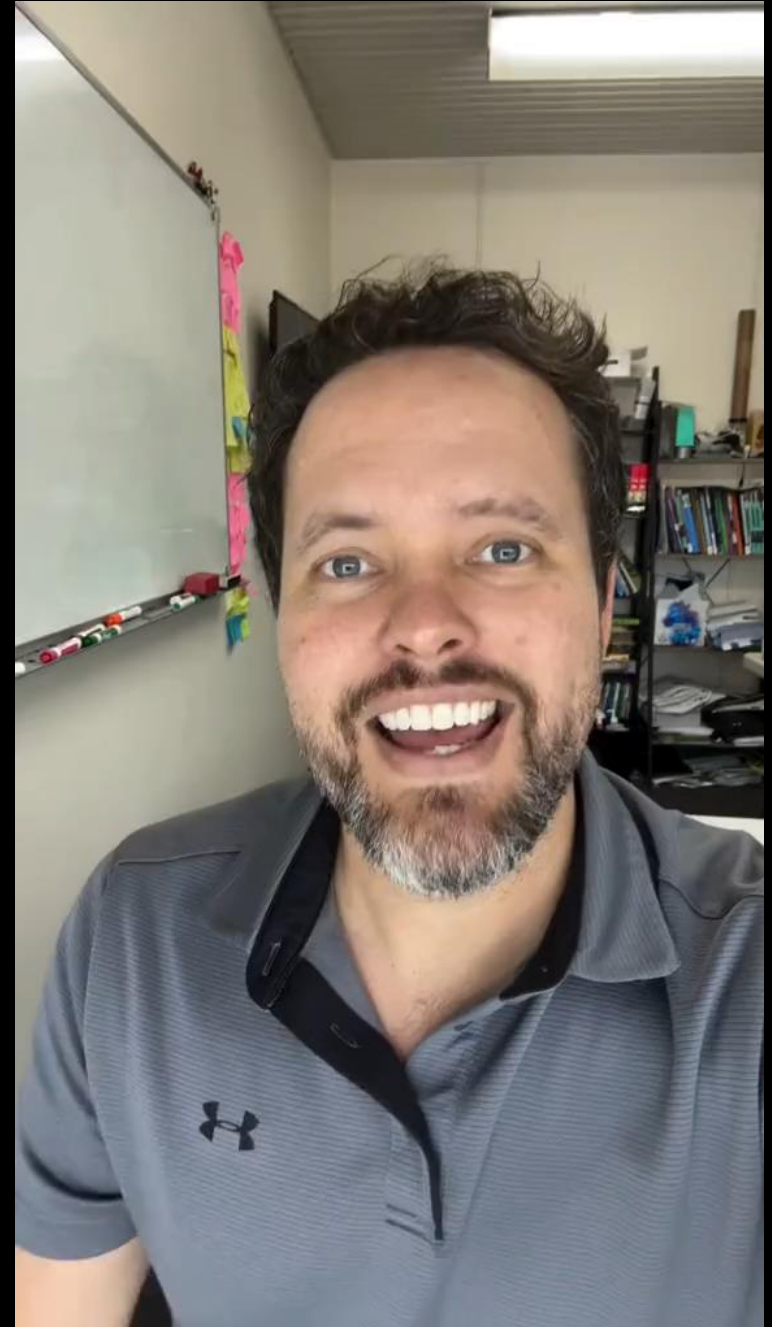
CREATING EVERGREEN CONTENT

EVERGREEN CONTENT

- A piece of content is evergreen if you can post it at different times and it is still relevant.
- Referring to any element of time usually limits content becoming evergreen.
- Referring to specific products limits evergreen content as products can change.
- Give as much value as possible in the most general way.

REPOSTING CONTENT

- Create a bank of evergreen content.
- You can then repost his content when you are too busy to create new content.
- It's important to note that some of your content shouldn't be evergreen. Sometimes more specific, time stamped content performs very well.
- Focus on your offerings.





DRIVING TRAFFIC TO YOUR WEBSITE

PATHWAY SPECIFIC CONTENT

- How you educate your audience will determine the type of leads you generate.
- What phase of life or financial situation represents your ideal lead?
- Creating content designed to help people manage their mortgage will increase the likelihood your leads have a mortgage.
- Creating content that educates people how to minimise tax through family trust structures will increase the likelihood your leads are small business owners.

CALL TO ACTION

- Provide value 10 times more than you ask for business.
- But when you do ask for business, be explicit.
- Tell your viewer exactly what they need to do to get in contact with you.
- You've probably noticed a trend in my Educational style videos.

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CAPTURING ONLINE LEADS

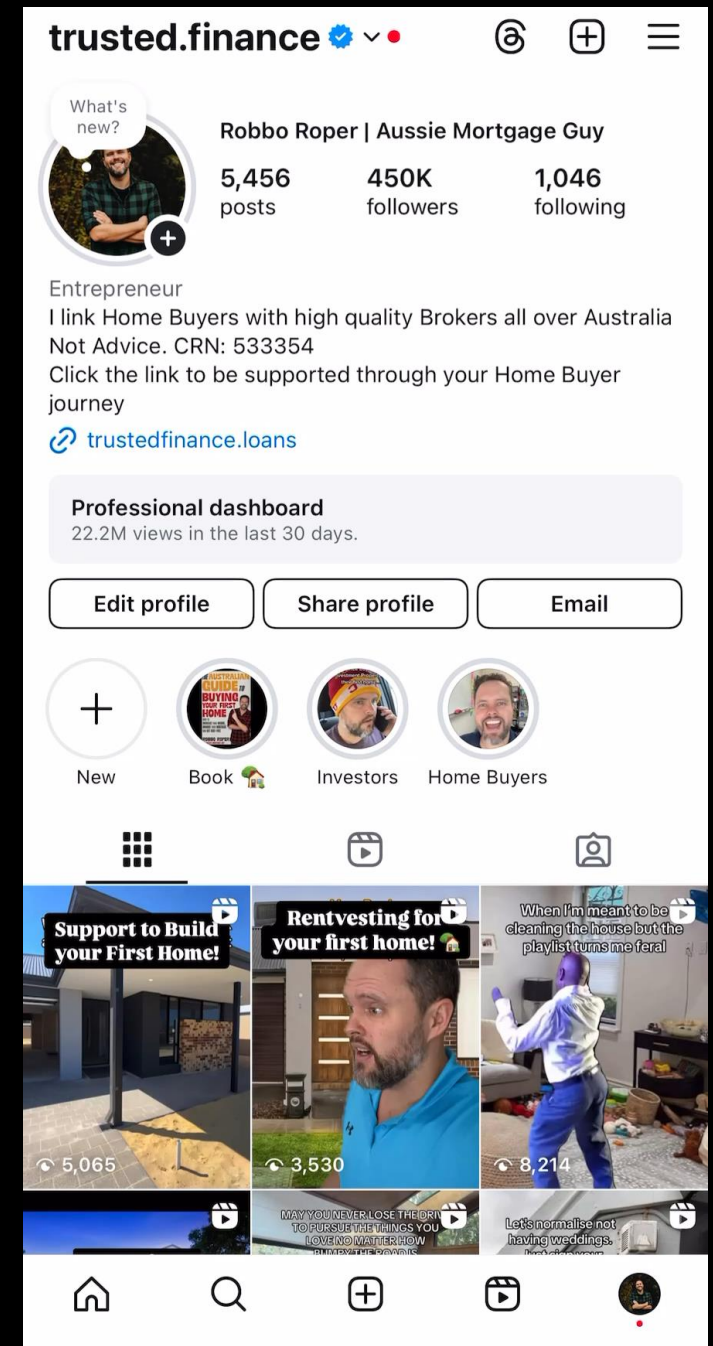
LINK SIMPLICITY

- Focus on directing your viewers to your profile as it is frictionless for the user to stay within the app.
- This is why its so important for your bio to act as a sales funnel.
- Fight the urge to use a Link Tree – too many options
- More simple = More Leads
- Complicated websites can reduce the click through rate, instead push your leads directly to your contact form web page.

CONTACT FORM

- To connect with my Leads, I require them to complete a contact form.
- The less information you need them to complete, the more Leads you will generate.
-
- The more questions you ask them in this form, the more engaged the Leads will be.
- I require my Leads to answer over 30 questions about their financial situation as I want the most engaged Leads on market.

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SOLD BEFORE THEY MEET YOU

- Creating organic content on social media will build your brand awareness
- If you create using the three pillars of content, you will generate WARM Leads
- Organic Leads will have higher likelihood of converting than paid Leads
- You can reach Customers all over Australia

WHY DOESN'T EVERYONE DO IT?

- You will be forced out of your comfort zone
- Consistently creating and posting content is the key to success
- But success requires stamina.
- Ask yourself this question: What will make you accountable?



SUPPORT TO SUCCEED

MARKETING MENTORSHIP PROGRAM

- Weekly group meeting to discuss content structure and trending topics
- Opportunity to ask questions and get content feedback.
- Collaborate to create a content creation schedule for your business.
- 10 week commitment – limited number of Advisers – the accountability you need.

INSPIRE AND EDUCATE YOUR TEAM

- Tailored Mentorship Program designed to build your companies brand awareness
- Weekly group meetings for your team exclusively
- Opportunity to package together “in person event” pending size of team
- Equip your team with the skills they need to grow your business

HOW TO SECURE YOUR SPOT

- Use your camera to scan the QR code or go to:

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- Scroll down to the bottom of the page to complete the contact form
- I will give you a call in the coming days to answer your questions and discuss my Mentorship Program





**THANK
YOU**

- I want to provide you with as much value as possible
- I am going to set up in the foyer for the next 30 minutes

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