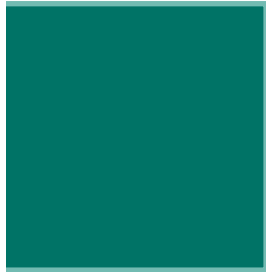
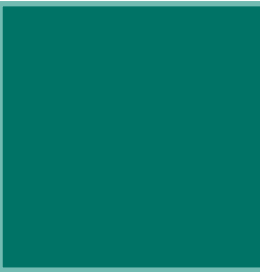


Welcome
to
MAC





Marketing Resources



What we will cover



- Setup & Compliance
- Marketing Resources & Tools
- Communications First Steps

Setup & Compliance



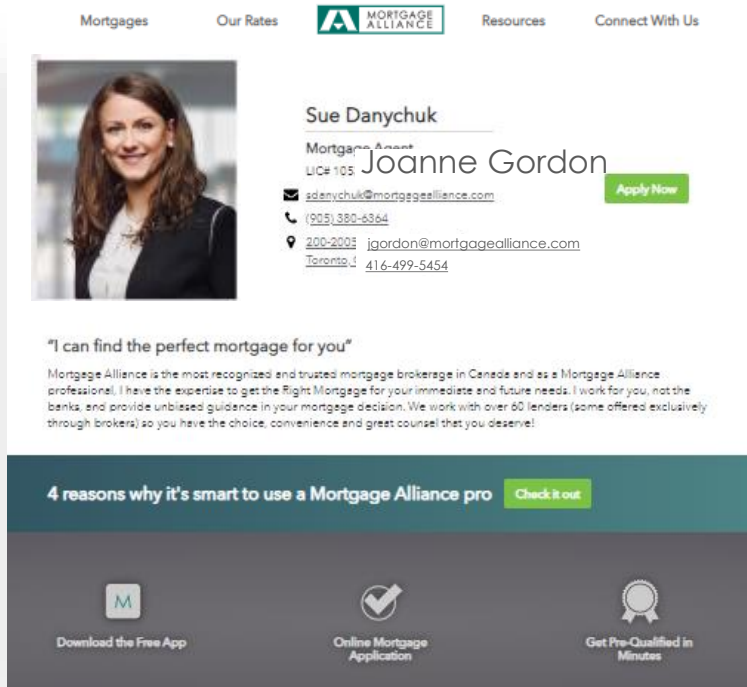
- Use of corporate logo / Franchise logo
- Full name as registered with provincial regulator
- Regulatory title
- Brokerage Licence number (if operating in Ontario)
- Address: Corporate address/Franchise address – For BC the branch address.
- For Team Leaders: Any team name must include the Mortgage Alliance logo in the same size or greater. Team name must include the words "team", "group" or ".com". Must be approved by the compliance department.
- Multi-service advertising is not permitted for regulatory reasons.

Setup

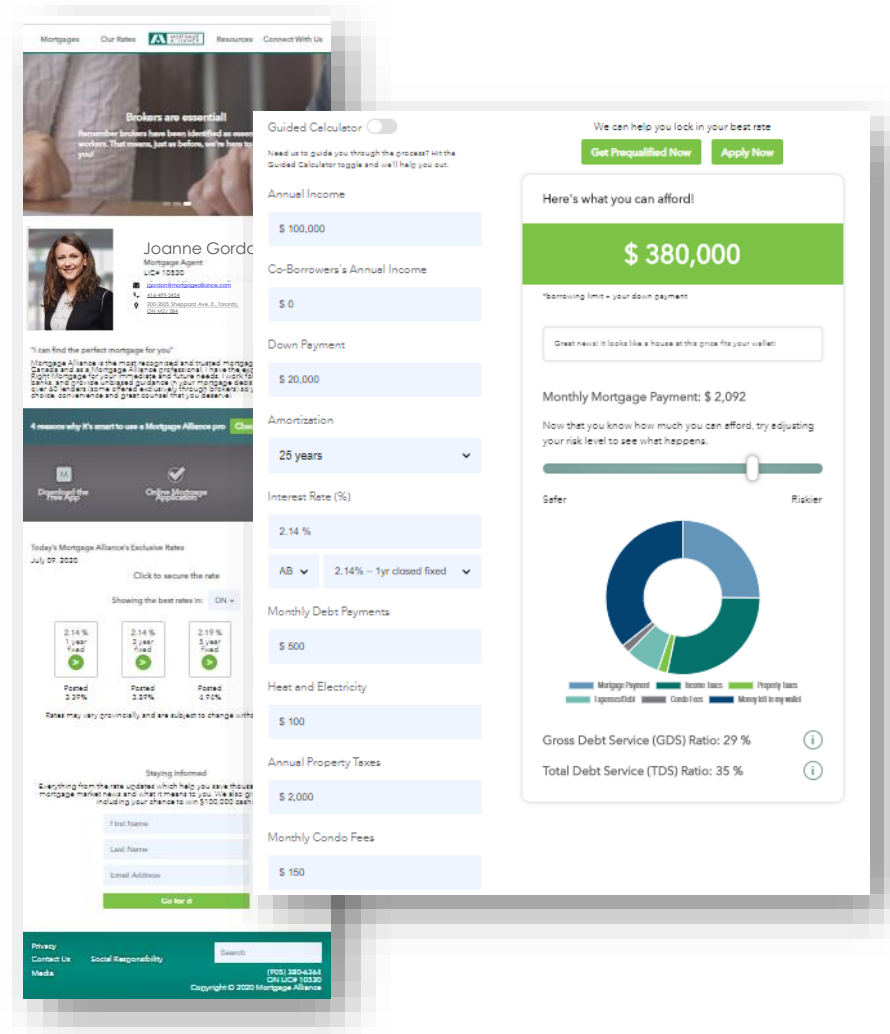


- Profile Picture > marketing@mortgagealliance.com
- Toll Free > 1-877-366-3487
- Business Cards > marketing@mortgagealliance.com
- Website & Rates
- Email Signature
- Social Page(s)
- Upload your contacts
- Your intro
- Your auto-communications

YOUR MORTGAGE ALLIANCE WEBSITE



- Customize content
- Customizable rates
- Fully responsive design
- State of the art calculators
- Integrated with MortgageBOSS
- Premium Services



Easy Applications

Your Customers Like Choices - Your Applications Deliver

Multiple application options:
EZ, Short and Full application.

Applications for different types of credit:
Mortgages, personal loans or credit cards.

Customers can apply using whatever
medium they prefer. From phone to tablet
or desktop to mobile app.

All applications feed into your
MortgageBOSS™ system.

The screenshot displays the Mortgage Alliance website interface for a 'Short Application'. At the top, the Mortgage Alliance logo is on the left, and contact information for Joanne Gordan, Mortgage Broker, is on the right, including her phone number (416-555-5555) and email (agent@mortgagealliance.com), along with a profile picture. Below the header, a green bar indicates 'Mortgage Application - Short Application'. Three tabs are visible: 'Short Application' (selected), 'Full Application', and 'EZ Application'. The 'Personal Information' section is highlighted with a green icon. The form contains the following fields: First name*, Last name*, Phone*, Email*, Date of Birth* (with dropdowns for month, day, and year), SIN, Street Number*, Street Name*, Street Type* (dropdown), Street Direction* (dropdown), Unit Number, City / Town*, Province* (dropdown), and Postal Code*.

MOPOLO Consumer App

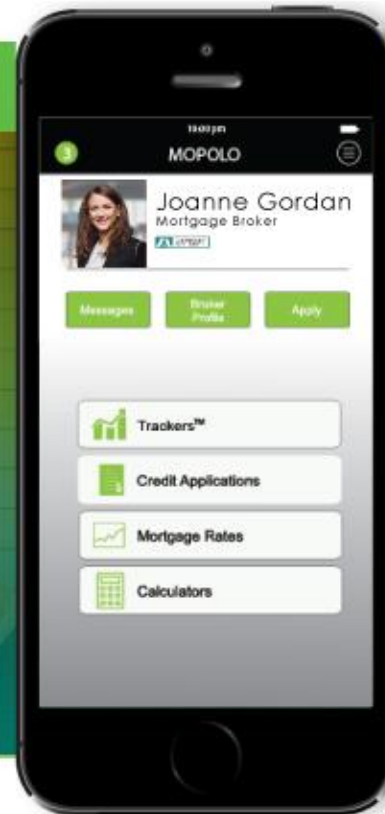


An App Like No Other

- ✓ FREE Credit Score
- ✓ FREE Property Evaluation
- ✓ Apply Anytime Anywhere

Plus rates, calculators, messages and more!

Your branded app for customers, prospects & referral Sources



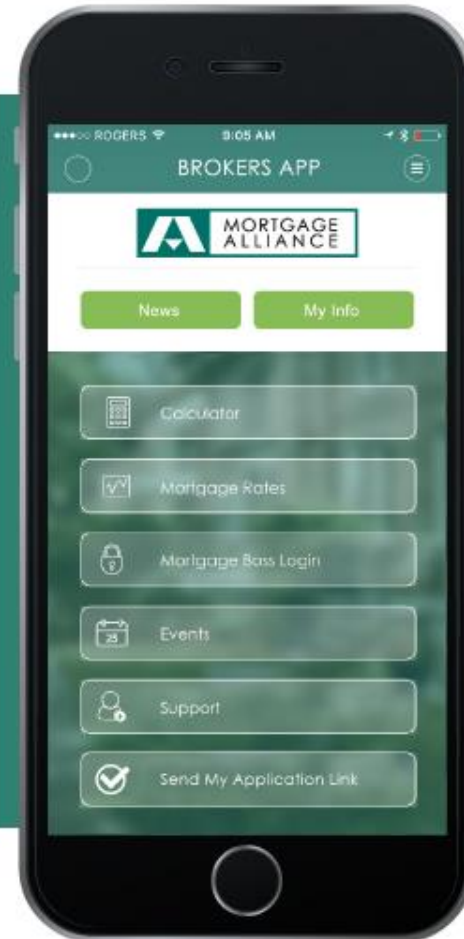
“ 89% of home buyers use a mobile device during their home search ”



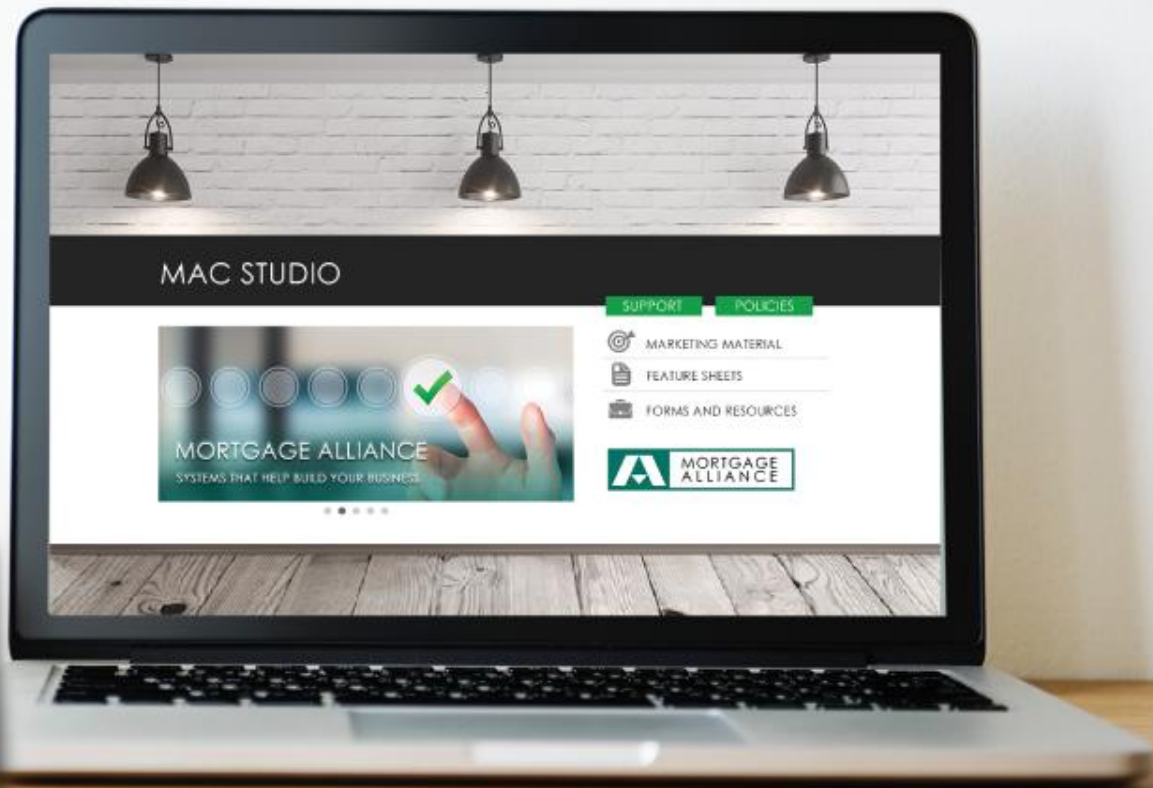
www.mopolo.ca 

The Brokers App

KPI's
Rate Sheet
Support Team
Calculator
Events
Messages & News
Send Your Application



Search "Brokers App" in any app store to download



MAC STUDIO

Generate Personalized Marketing Materials In Seconds
 Generate Professional Co-Branded Feature Sheets
 Access Important Forms And Resources

Marketing Team

Behind every great Mortgage Alliance Professional is a seasoned marketing and creative team that builds advertising promotional programs, custom tailored just for you.

From print, digital, collateral, social and event support, we help you build your business one medium and one customer at a time.

We don't believe in templates. Why?
Because you're unique & so is your marketing

Contact us at [marketing @mortgagealliance.com](mailto:marketing@mortgagealliance.com)



Social Media Management

Welcome
to
MAC

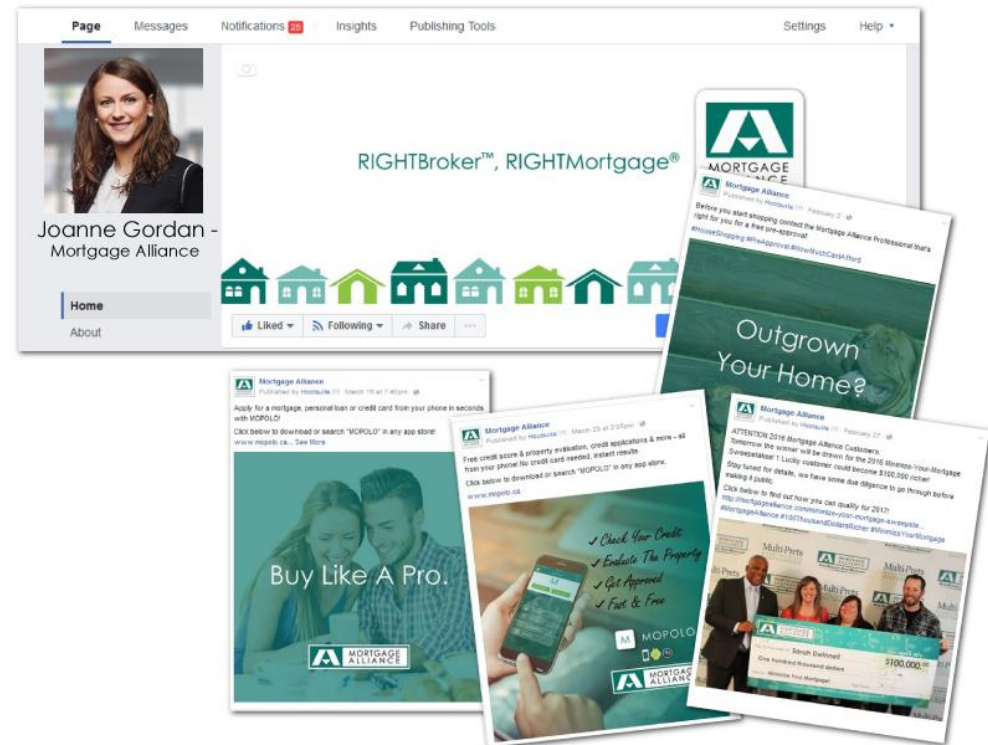
Automated



YOU REMAIN IN COMPLETE CONTROL
of your own business page

2 TO 3 POSTS PER WEEK
That build your social media reach

GENERATE AWARENESS AND LEADS
Professional content that positions YOU
as the expert





win
YOUR MORTGAGE
PAYMENTS
FOR A YEAR
\$25,000!*

UP TO

It Pays To Use the RightBroker™!

One lucky Mortgage Alliance customer per quarter in the sweepstakes duration will win one grand prize consisting of the value of their new Qualifying Mortgage payments during their first year, up to a maximum of \$25,000!!

*NO PURCHASE NECESSARY. Legal residents of Canada only (except Quebec). Begins 7/1/20 and ends 12/31/20. One winner per quarter. Conditions apply. See mortgagealliance.com/sweepstakes/win-your-mortgage-payments for details. Sponsor: Mortgage Alliance Company of Canada.

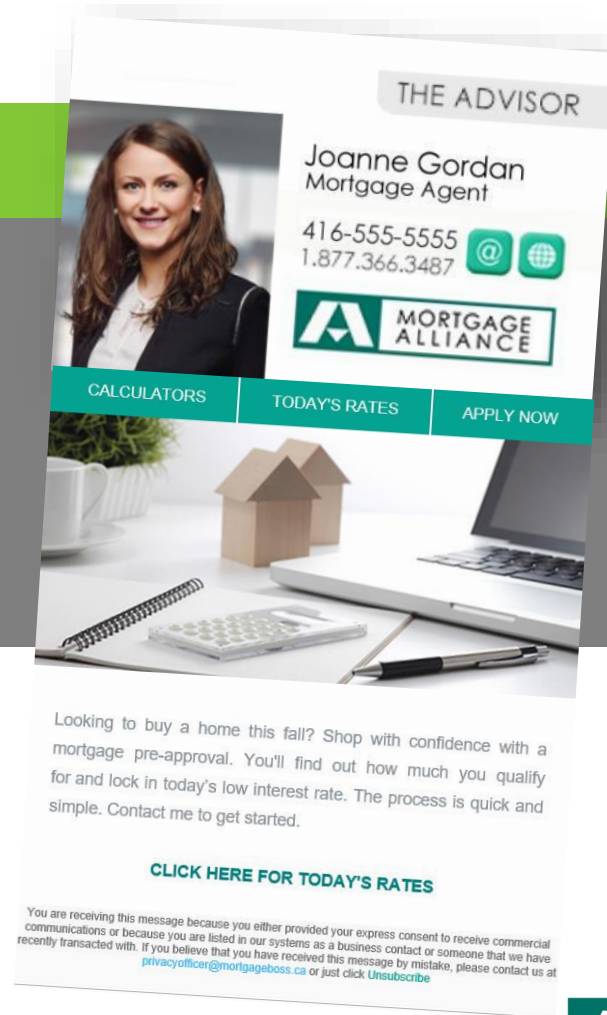
The Advisor

Welcome
to
MAC

Automated

Rate Updates

Automated weekly rate update email sent to your database on your behalf



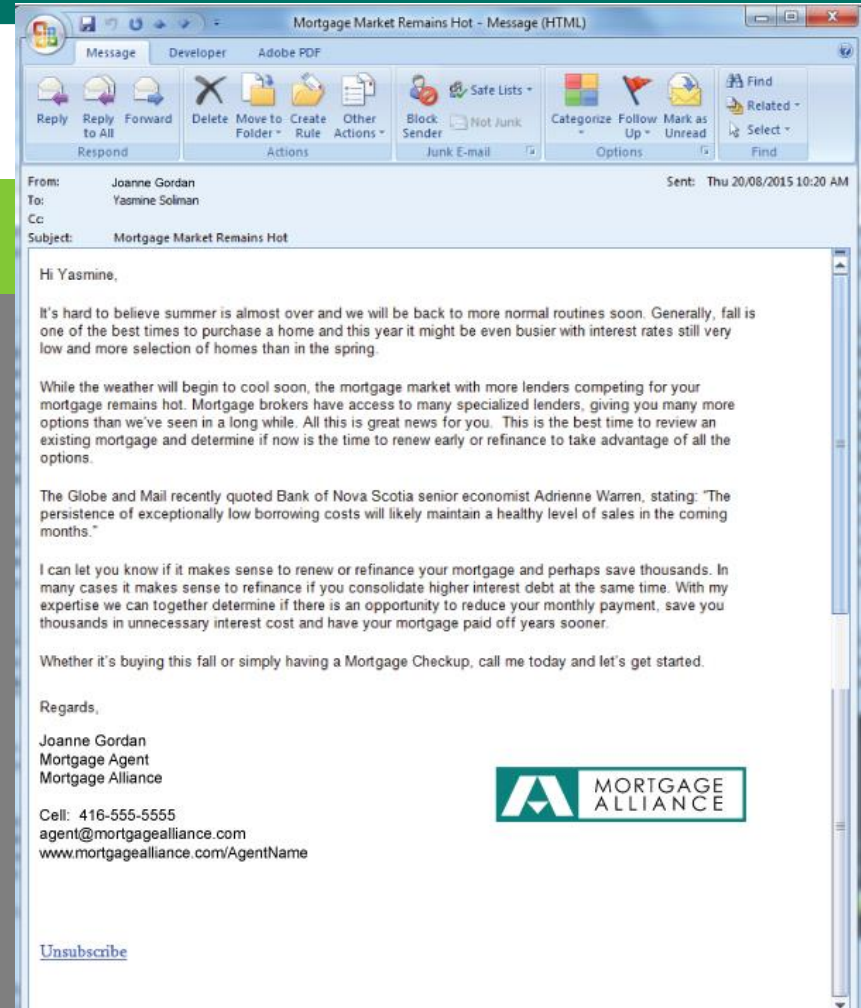
The CC (Customer Communication)

Welcome
to
MAC

Automated

Monthly Communications

- Timely and newsworthy communication designed to generate leads and keep you top of mind.
- Sent automatically to your database on your behalf once a month.
- Phenomenal 25%-30% open rate



Communications



- Upload Your Contacts
- CASL Consents
- Send Your Intro
- Automated Communications

Two types of consent:



1. Express
2. Implied

Express Consent



- Customer explicitly agrees, by “**opting in**”, to receiving communications.
- Express consent **does not expire** unless the customer unsubscribes.

How express consent is obtained

1. A contact filled an application and gave consent for communications.
2. A contact registered for communications on the corporate or broker websites
3. A contact opted in through a consent invite.
4. A contact has given you written or verbal consent for communications and you can prove it.

Implied Consent



- Customer consent for communications is inferred.
- Implied consent **expires** and can be revoked if the customer unsubscribes.

Implied consent is given to:

- Post transaction contacts and expires 24 months post transaction
- Contacts who send you an inquiry. Expires after 6 months.

Manual Consent – Adding a new contact



Add New Contact & Follow the prompts to add consent



Personal Details



Consent for Communications

Adding a contact in MortgageBOSS with an email address will activate auto communications. By clicking SAVE you acknowledge that you either have implied or express consent for communications from this contact as per our Anti-Spam Policy and CASL requirements. It is your sole responsibility, to have proper evidence and maintain accurate records, to be able to prove that you have received such consent.

What type of consent for communications do you have for this contact?

☐ Express ☐ Implied ☐ I have no consent

BACK

CONTINUE

Manual Consent – Adding consent to multiple contacts on the system



- Select your contacts > Communications

The screenshot displays the MAC system interface. At the top, there's a navigation bar with 'My Contacts' and a settings gear. Below this is a table of contacts. A green arrow points to the 'Communication' icon in the top toolbar. Another green arrow points to the checkbox in the first column of the contact table, indicating selection.

<input type="checkbox"/>	CONTACT NAME	RATING	PHONE NUMBER	EMAIL ADDRESS	OWNER	
<input checked="" type="checkbox"/>	test			test@mortgagealliance.com	Yasmine Soliman	
<input checked="" type="checkbox"/>	Test Marketing			testmacmarketing@hotmail.com	Yasmine Soliman	

Manual Consent

– Adding multiple contacts



- Record Manual Consent and confirm.

Manage Communication

Manage Consent for Communications

INVOKE FOR EXPRESS CONSENT

RECORD MANUAL CONSENT

☐ Express ☐ Implied

Manual Consent Source

Select a value

Details

Enter additional details

Message

By clicking continue you acknowledge that you have received written or verbal express consent or implied consent for communications from this contact as per our Anti-Spam Policy and CASL requirements. It is your sole responsibility to have proper evidence and maintain accurate records, to be able to prove that you have received such consent.

CONFIRM

Send your Intro



- Select you contact (s)
- Mail merge
- Select the appropriate template:
 1. Joining Mortgage Alliance (new to industry)
 2. Switching to Mortgage Alliance (from other brokerage)
 3. Switching to Mortgage Alliance (from bank)
- PREVIEW and send

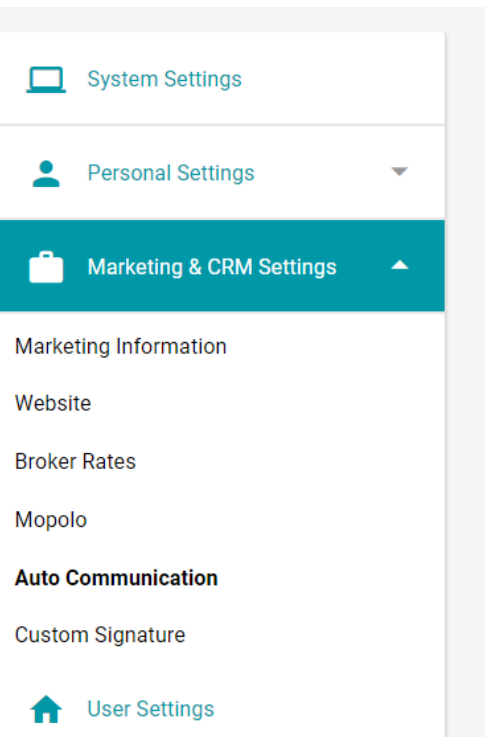
(TIP: Add yourself as a contact in your BOSS and test your emails by mail merging them to yourself to see how they are received before sending to your network)



Activating Your Auto Communications



- Settings from the main menu (top right)
- Marketing & CRM
- Auto Communication > toggle to activate



Auto Communication	
Email Type	Communication Status
Monthly CC	Active <input checked="" type="checkbox"/> Inactive
Mortgage Rate Advisor	Active <input checked="" type="checkbox"/> Inactive
VRM	Active <input checked="" type="checkbox"/> Inactive

Excluding certain contacts from Auto Communications



- Click on the contact
- Communication (left menu)
- Deactivate the auto-communication under Agent status > Click Update Status

EMAIL TYPE	COMMUNICATION	Consent Type	Consent Source	UPDATE DATE	EXPIRY DATE	CUSTOMER STATUS	AGENT STATUS
Broker communications	No	-				No	Active ▾
Monthly CC	No	-				No	<div><div>Inactive</div><div>Active</div></div>
Mortgage Rate Advisor	No	-				No	Inactive ▾
VRM	No	-				No	Active ▾

RECORD MANUAL CONSENT

UPDATE STATUS

Thank you



BOSS Support info@mortgageboss.ca

Marketing Support
marketing@mortgagealliance.com