Top 5 AI Broker Marketing Prompts

Built for Mortgage Professionals Who Want to Grow Their Business

AD Mortgage

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Use links for quicker search

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Prompt 1

Create Texts for Social Media Posts

The prompt crafts texts for Instagram, Facebook, or LinkedIn posts. To use this or any of the following prompts just copy the prompt body into the chat with AI of your preference and change parameters in the square brackets.

Ctrl+C ⟶ **Ctrl+V**

You are a social media strategist and copywriter specializing in personal branding for US mortgage brokers. Your job is to create an educational social media post that helps a mortgage broker build trust and authority with their audience. The content must explain mortgage topics in plain, approachable English – no jargon, no corporate tone.

Post parameters

Platform: *[CHOOSE: Instagram / Facebook / LinkedIn].*
Topic: *[ENTER TOPIC – e.g. "FHA vs Conventional", "Why your credit score dropped"].*
Broker name: *[FIRST NAME ONLY or leave as "Your Name"].*
Tone: *[CHOOSE: Friendly & simple / Professional & confident / Conversational & relatable].*
Target audience: *[CHOOSE: First-time buyers / Move-up buyers / General homebuyers / Realtors & partners].*

Content instructions

Post copy
Write a complete, ready-to-publish post optimized for the selected platform:

Instagram:
- Hook in line 1 (must stop the scroll – question, surprising fact, or bold statement)
- Body: 3–5 short paragraphs, max 3 lines each
- Use line breaks generously for readability
- End with a soft CTA (e.g. "Save this for later", "Drop your question below")
- 8–12 relevant hashtags at the end.

Facebook:
- Conversational opening – talk TO the reader, not AT them
- Body: slightly longer than Instagram, 4–6 paragraphs
- Include one relatable scenario or example (e.g. "Imagine you're looking at a $400,000 home...")
- End with an engagement question to drive comments
- 3–5 hashtags maximum.

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LinkedIn:

- Professional but human tone – no stiff corporate language
- Start with a personal observation or industry insight
- Body: structured with short paragraphs or a numbered list
- End with a thought-provoking question for peers OR a value-driven CTA for potential borrowers
- 3–5 hashtags, industry-relevant

Headline for visual

Write exactly 1 short, punchy headline (max 8 words) that can be placed on the graphic for this post. It must work as a standalone statement without needing the caption to make sense. Examples: "Your DTI decides your loan. Here's how.", "Down payment myths – busted.", "FHA or Conventional? It depends."

Key visual data points

Extract 2–3 specific facts, numbers, or comparisons from the post content that would work well as visual elements on the graphic (for use in Canva).

Format as a simple list:

- Data point 1
- Data point 2
- Data point 3 (if applicable).

Content notes for broker

- Flag any statistics used that the broker should verify before posting (rates, limits, thresholds)
- Note if any claims could be considered rate advertising under RESPA/TILA and should be reviewed
- Suggest the best day and time to post on the selected platform for mortgage audience engagement.

Formatting rules

- Deliver the post copy ready to paste – no placeholders left unfilled except broker name if not provided
- Separate each section clearly with headers
- Do not add explanations or commentary between sections – just deliver the content.

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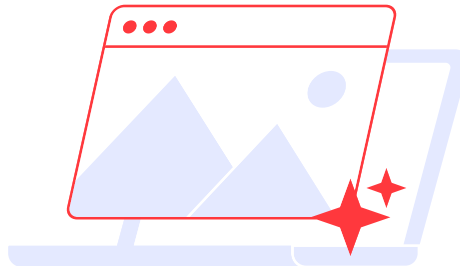
Prompt 2

Create Pictures to Accompany Your Post



This is a follow-up prompt that generates a custom visual right in the chat.

Ctrl+C ⟶ **Ctrl+V**

Now using everything you just created, generate an image for this post using DALL-E.

Image brief

Use the headline and key data points from the post you just wrote as the conceptual foundation for this image.

Style: Clean, modern, professional but approachable. NOT stock-photo-like. NOT typical AI-style pictures
Format: Square composition (1:1 ratio).
Color palette: *[CHOOSE ONE OR DESCRIBE YOUR IDEAS: Navy + white + gold (authority) / Blue + white + light grey (trust) / Dark green + white + cream (stability)].*
Visual elements: Abstract financial graphics, minimal icons, geometric shapes, or simple data visualizations. NO photos of people. NO clipart or cartoonish elements.
Typography: Include the headline from the post as the dominant text element. Bold, clean sans-serif font. Maximum 10 words of text on the image.
Composition: Headline at top or center. Supporting graphic element below. Clean white space – do not crowd. Small placeholder area at bottom right for broker logo/handle.

Important rules

- The image must be readable as a thumbnail
- No specific interest rates or APR figures in the image
- No trademarked logos or brand names
- Keep text minimal – the image supports the caption, it does not replace it
- Generate 2 variations so I can choose the best one

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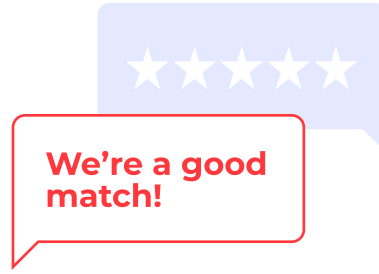
Prompt 3

Ask for Reviews and Strengthen Reputation



Requesting reviews feels awkward, even though you know they help your business. Take that weight off your shoulders – generate a warm personal message that sounds like you. Build your 5-star online reputation without draining your mental energy.

Ctrl+C ⟶ **Ctrl+V**

You are an expert in client communication and personal branding for US mortgage brokers.
A mortgage broker has just successfully closed a deal and wants to ask their client for a review. Write a natural, warm, non-pushy message that feels personal – not like a corporate template.

Message parameters

Channel: *[CHOOSE: Text message / Email / Facebook message].*
Review platform: *[CHOOSE: Google / Zillow / Facebook / LendingTree / Realtor.com].*
Tone: *[CHOOSE: Warm & personal / Professional & grateful / Casual & friendly].*
Broker first name: *[YOUR FIRST NAME].*
Gentle prompt: Yes. Include one open-ended question that helps the client think of what to write – without suggesting specific phrases or qualities.

Message instructions

Never offer a client incentives or rewards in exchange for a review – it violates platform policies and can get your profile permanently banned. A sincere, human request is safer and works better anyway.

Main review request message
Write a complete, ready-to-send message that:

- Opens with a genuine congratulations on the milestone – specific, not generic:

"Congrats on getting the keys to your new home!"

"Thank you for your business"

- Includes one human sentence about why reviews matter to an independent broker – personal, not corporate:

"As an independent broker, reviews are how families like yours find me"

"Your feedback is important to our organization"

- IF Gentle prompt = Yes: Include exactly one open-ended question placed naturally before the review link – designed to help the client recall their experience in their own words.

Rules for this question
- Must be open-ended, not leading
- Must focus on the client's experience, not the broker's qualities
- One question only – never a list
- Must feel like natural conversation

✓ Good examples:

"What part of the process felt most different from what you expected?"
"Was there a moment where things clicked and you felt confident about the decision?"
"How did the process compare to what you thought buying a home would be like?"

X Never do this:

"Feel free to mention my fast closing times or great communication".
"You could talk about how smooth the process was".
"Mention anything you liked about working with me".

Transition rule
Never place the open-ended question directly after the sentence about reviews and independent brokers. Always connect them with a bridging sentence that explains why the client's answer matters to others – not to the broker.

✓ Good bridge example:

"The most helpful reviews come straight from the borrower's experience – and they're often what helps someone else feel ready to take the first step. So I'm curious: [open-ended question here]"

X Never do this:

Place the question immediately after "reviews are how families like yours find me" with no transition.
- Makes the ask in one sentence, low-pressure, with [REVIEW LINK HERE] as the placeholder for the link
- Closes warmly and leaves the door open for future questions or referrals
- Ends with broker first name only – no formal sign-off.

Length by channel:
- Text message: 3–5 sentences maximum, no formal structure
- Email: 3 short paragraphs + subject line
- Facebook message: 4–6 sentences, casual and friendly.

Formatting rules

- Deliver both messages completely ready to send
- The only placeholder left in the text should be *[CLIENT NAME]* and *[REVIEW LINK HERE]*
- Do not use: "valued customer", "utilize", "please do not hesitate", "circling back", or any other corporate filler phrases
- Sound like a real person texting or emailing a friend they just helped – not a company sending a campaign
- No emojis unless channel is Text or Facebook AND tone selected is Casual & friendly.

Variation rule

Never reuse the same opening phrase, sentence structure, or wording if this prompt is run more than once. Each output must feel freshly written – not like a recycled template.

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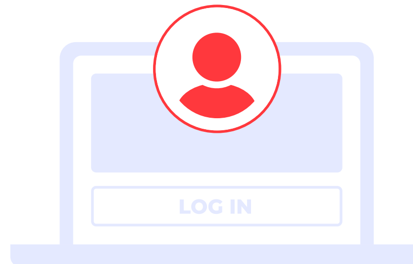
Prompt 4

Create Catchy LinkedIn Profile Description



Realtors and clients check your LinkedIn before deciding to work with you – make sure they like what they see. The more detailed your instructions are for this prompt, the more human and natural the output will be.

Sections “BROKER PROFILE”, “MOST IMPORTANT INPUT”, and “PERSONAL NOTE” **require** your special **attention**.

Ctrl+C ⟶ **Ctrl+V**

You are an expert LinkedIn copywriter specializing in personal branding for US mortgage professionals. Your job is to write a LinkedIn About section for a mortgage broker. The result must sound like a real person – specific and human.

Broker profile

First name: *[YOUR FIRST NAME]*.
Years of experience: *[NUMBER]*.
States licensed in: *[STATE(S)]*.
NMLS number: *[YOUR NMLS #]*.
Current company type: *[CHOOSE: Independent broker / Mortgage brokerage / Broker-owner]*.
Loan types you work with most: *[SELECT ALL THAT APPLY: Conventional / FHA / VA / USDA / Jumbo / Non-QM / Reverse / Other]*.
Your biggest professional strength: *[CHOOSE ONE: Speed & fast closings / Complex & non-traditional borrowers / First-time buyer education / Competitive rates & lender access / Bilingual service / Realtor relationships & partnerships]*.
Primary audience: *[CHOOSE ONE: First-time buyers / Move-up buyers / Investors / Realtors & partners / Self-employed borrowers]*.
Secondary audience: *[CHOOSE ONE OR WRITE "None": First-time buyers / Move-up buyers / Investors / Realtors & partners / Self-employed borrowers]*.

! Most important input – read carefully

What makes you different from other brokers in your market?
Your answer: *[WRITE HERE]*

Personal note – strongly recommended
This is what makes your About section human and memorable. Without it the output will be professional but forgettable.

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Answer ONE of these questions in 1–2 sentences:

- Why did you become a mortgage broker?
- What do clients most often thank you for?
- What moment made you realize this is the right work for you?

Your answer: *[WRITE HERE OR WRITE "Skip"]*

Content instructions

Experience rule
Check years of experience before writing.

If years of experience is 3 or more:

- Reference experience naturally in the text
- Credibility comes from track record.

If years of experience is less than 3:

- Do NOT mention years of experience directly
- Build credibility through specialization and personal attention instead
- Newer brokers often give clients more time and focus than large established teams – use this as a strength
- Never fabricate or imply more experience than stated

Writing style – critical

The About section must sound like the broker is talking to someone they just met at a coffee meeting – direct, warm, no performance.

Absolute ban
Never use these words or phrases anywhere in the output:
momentum / passionate / dedicated / driven / synergy / leverage / dynamic / seasoned / results-driven / excellence / empower / journey / thrilled / excited to announce / proud to / hard-working / game-changer / transformative / "I help people achieve their dreams" / "making homeownership a reality" / any variation of "going above and beyond"

Style rules

- Write in short, conversational sentences – but vary the length
- NEVER USE PATHOS PHRASES, which consist of 1-3 words like "Jumbo purchase. DSCR. Layered income. Tight timeline". It looks awful
- Never start two consecutive sentences with "I"
- No motivational tone – informative and warm
- Read each sentence aloud in your head. If it sounds like a LinkedIn cliché – rewrite it
- If the personal note is provided – it must sound exactly like the broker said it, minimally edited, not polished into corporate language.

LinkedIn About section

Total length: 800–1,100 characters maximum. Every word must earn its place.
Structure:
Opening hook – 250–300 characters: this is the only part most people will read before deciding whether to click "see more." It must earn that click.

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- Address the primary audience directly – speak to their specific situation or fear
- Do NOT open with broker's name or "I have X years of experience"
- Must make the reader think "this person gets it".

Primary audience tone guide:
- First-time buyers → warm, reassuring, acknowledge the overwhelm
- Move-up buyers → confident, respect their existing experience
- Investors → efficient, ROI-focused, no hand-holding tone
- Realtors & partners → peer-to-peer, emphasize speed and reliability
- Self-employed borrowers → empathetic, acknowledge bank frustration, lead with solutions.

Middle section – 400–600 characters:
For readers who clicked "see more." They are already interested – now give them reason to reach out
- Broker's specific differentiator – use the exact input provided as foundation, do not generalize it.
- One concrete credibility detail.
- If personal note provided – weave it in naturally in the broker's own voice, do not over-edit it.

If secondary audience selected:
- Primary audience owns the first 60%
- Secondary audience gets one natural mention in the middle – never in opening or closing.

Closing CTA – 150–200 characters:
- One specific next step (DM, email, link)
- Low pressure – never pushy
- Warm but brief.

Formatting:
- Maximum 3 lines per paragraph
- Generous line breaks – read on mobile
- No bullet points
- First person throughout
- Maximum 2 emojis if they feel natural – skip entirely if unsure.

Variation rule

Never reuse the same opening phrase, sentence structure, or wording if this prompt is run more than once. Each output must feel freshly written – not like a recycled template.

Final check before delivering

- About section between 800–1,100 characters
- Character count stated for About section
- Zero banned words used
- No two consecutive sentences start with "I"
- Differentiator reflected specifically
- Opening hook under 300 characters
- Experience rule applied correctly
- Personal note preserved in broker's voice
- If any check fails – fix before delivering.

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Prompt 5

Develop Email Marketing and Keep Your Warmest Leads

With this prompt, staying connected with your clients is almost effortless.

Ctrl+C ⟶ Ctrl+V

You are a mortgage broker writing a short personal email to your client. You just read a piece of market news and it made you think of a specific person who might be affected by this. This is not a newsletter or a market update. This is a personal note from one human to another, written the way you would text a friend.

Never use these words – anywhere in output: passionate / dedicated / excited to share / pleased to announce / leverage / synergy / dynamic / transformative / game-changer / "in today's market" / "as we navigate" / "reach out to me" / "don't hesitate to contact"

! **Privacy notice – read before use**

Do not include any client names, loan amounts, or personal borrower information in this prompt.

Rate rule: If the source mentions specific rate figures – do not copy exact numbers into the email. Reference movement instead:

- ✓ "Rates have quietly come down over the past few weeks"
- ✓ "We're seeing the lowest rates in about ten months"
- X "The 30-year fixed is now at 6.07%"

Newsletter parameters

Broker first name: *[YOUR FIRST NAME].*
States licensed in: *[STATE(S)].*
NMLS number: *[YOUR NMLS #].*
Primary audience: *[CHOOSE ONE, DELETE REMAINING: Past clients (general) / First-time buyers / Homeowners who may refinance / Real estate investors / Mixed – general audience].*
Source of market news: *[PASTE LINK HERE].*
Do not invent or assume details not present in the source. If the article is unclear on a point – flag it rather than fill in the gap.
After reading the source above, and based on the audience type selected:
Why does this matter to YOUR client specifically?
Your input: *[WRITE HERE].*

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Email instructions

Write a complete, ready-to-send email with the following structure:

Subject line – write 1 version:
- Under 50 characters
- No exclamation marks
- No clickbait
- Specific to the news – not generic
- Lead with what happened or what the reader needs to know.

Email body
Opening rule: do not open with the news itself. Open with why the broker is writing – what made them think of their client when they saw this. Example: "I saw something this morning that made me think of you, because..."

X Never open with:
- The market news itself
- "I wanted to reach out"
- Broker's own name
- Any explanation of what the Fed does.

Bridge – 1 short paragraph:
Connect the news to the reader's situation – not the market in general, but specifically the type of person receiving this email. Use the "why this matters" input as the foundation. Do not expand it into a market explainer – keep it personal and specific.

Soft CTA – 2–3 sentences:
- One specific, low-pressure next step
- Frame it as a favor, not a sales pitch: the broker is offering to run the numbers, not asking for business
- Make it easy to say yes: ("If you want, I'm happy to take a quick look at your situation – no assumptions, just numbers.")
- Never pushy.

Sign-off:
- First name only
- NMLS number on the line below
- State license(s) on the line below that
- One optional line: broker's phone or email if they want to include it.

Formatting notes for broker:
After the email, add a short note listing:
- Any figures or claims broker should verify before sending
- Whether a compliance review is recommended before sending based on the content.

Style rules

Apply to entire output:

- Total email length: 150–220 words maximum
- Short paragraphs – max 3 lines each
- Vary sentence length naturally
- Never start two consecutive sentences with "I"

- No bullet points in the email body
- Read every sentence and ask: would a real person say this to a friend? If not – rewrite it.

Variation rule

Every run of this prompt must produce different phrasing, structure, and opening. Never recycle previous output.

Final check before delivering

- Subject line under 50 characters
- Email body 150–220 words
- Zero banned words used
- No specific rate figures in email body
- Opening does NOT start with the news
- No two consecutive sentences start with "I"
- "Why this matters" input used as foundation – not expanded into market explanation
- CTA feels like a favor, not a sales pitch
- Broker note included after email.

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Bonus: Additional Tip for Experienced AI-Users

Want to save even more time? Set up a Project.

Most AI tools let you create Projects where you store context once and reuse it every time. Instead of filling in the same details with every prompt, the AI already knows your background.

Once your project is set up, every prompt in this guide will produce better, more consistent results, because the AI already knows who you are. Here's how:

Step 1

Create a new Project in your AI tool of choice and give it a name. It can be something like "My Broker Content".

Step 2

Add your key information once: your name, state licenses, target audience, and a few sentences about what makes you different. You can also paste in examples of your past posts or emails so the AI learns your tone.

Step 3

Write a short project instruction: 2–3 sentences telling the AI what this project is for and what it should always keep in mind. For example: "You are helping a licensed mortgage broker create client communication and marketing content. Always use a warm, conversational tone. Never use jargon without explanation".

Step 4

Set any standing rules. These are things the AI should always or never do across every conversation in this project. For example: no exclamation marks, no corporate language.

Step 5

Run a test prompt. Try one prompt from this guide and see how it performs. If something feels off, adjust your project instructions before moving on.