

How to join The Mortgage Mum

Thank you for your interest in joining The Mortgage Mum!

The Mortgage Mum is more than just a mortgage broking firm. We are looking to carve a brand-new path in the financial services industry. First, creating space for women in a very male dominated industry, and secondly proving that working flexibly CAN work amazingly well in a role like this.

“Amazing customer service, an inspiring flexible working environment and a community of women supporting one another; rather than competing for space.”

We have had such an exciting journey so far, and we are just getting started!

ARE YOU AN EMPLOYED BROKER LOOKING TO TRANSITION TO SELF-EMPLOYED?

We have been there! It is a huge leap of faith, but we know exactly how to catch you, and help you transition to self employed life as a broker.

ARE YOU A SELF EMPLOYED BROKER WITH A FEELING THAT YOU'RE NOT IN THE RIGHT ENVIRONMENT FOR YOU?

We have been there too! Our environment dictates our performance, and we know exactly how to help you succeed. You deserve to be supported and celebrated.

WHAT SHOULD YOU EXPECT FROM THE MORTGAGE MUM AS AN EXPERIENCED BROKER?

The unique package we offer for experienced brokers is as follows:

- Access to a bespoke Marketing Mastermind, where you will learn how to create your own brand within The Mortgage Mum, and how to manage marketing alongside your role
- Access to our workshop on how to create your own business plan, to road map your journey to success
- The opportunity to mentor other brokers within the team, our value of “lift as you climb” is at the heart of what we do
- Enjoy a role that is “full time with flexibility”. Design your life, and work on your own terms!
- Be part of something bigger than you. Feel supported by a team of like minded women while you work.
- Access to a range of support, including wellbeing workshops and a culture of care. We do things very differently here!
- You will be coached to success, and held accountable along the way.
- The Mortgage Mum is like no other space in this industry, and we believe this unique environment nurtures women to be the best they can be

HOW DOES IT WORK?

You will be self-employed and will pay a monthly membership fee into The Mortgage Mum each month.

On arrival, you will receive:

- Your Mortgage Mum business cards
- The Mortgage Mum Handbook
- Free personalised marketing materials, with unlimited access to marketing assistance and advice from the Mortgage Intelligence team
- Remote set-up of your Mortgage Mum email, and Microsoft Office 365. Including software for video calls
- Access to our IT support helpdesk
- Access to our exclusive Broker Zone where you will find a huge resource of training materials
- Access to your training webinars
- Access to your initial compliance tests, including all study materials needed. This is an FCA requirement and you will conduct these tests annually.
- Access to compliance bulletins so you can start getting CPD hours immediately
- Access to our internal observation videos, so you can watch some of the team in action

WHAT DOES MY MONTHLY MEMBERSHIP FEE INCLUDE?

- Your own page on our amazing website including links to your email and all of your social media channels
- Leads to get you started
- Access to Criteria Hub and Affordability Hub – these are brand new systems which will really enhance your life as a broker!
- Access to our internal systems - our website; The Key and Mortgage Brain Anywhere
- Access to a Broker Helpdesk which can be used for any case as many times as you need
- A library of content and webinars
- 1:1 role play training before you go live as a broker
- Your data protection licence, paid for by The Mortgage Mum
- Monthly 1:1 coaching calls via video call with The Mortgage Mum
- Marketing 1:1 strategy sessions and group training sessions including social media support
- Monthly 1:1 meetings via video call with your Business Assurance Manager at Mortgage Intelligence including training on CPD, case checking and discussion around your progress
- Regular Zoom team meetings with The Mortgage Mum team, lenders, and industry contacts to offer in-house training
- Unlimited support from mentors within the team
- All cases checked by The Mortgage Mum before submission to a lender
- Access to a dedicated Mortgage Mum Protection writer, of which you will earn a % of commission for referrals
- In- house administration support
- Full membership to Mortgage Intelligence
- A community of amazing women!
- Flexible working and a generous commission structure
- We coach you how to become the best broker you can be!

WHAT IS THE MORTGAGE MUM STANDARD FOR CAS STATUS?

Unless you are a broker in Mortgage Intelligence, CAS status cannot be transferred. Therefore, even with experience, you will need to achieve CAS status again:

- CAS status can be reached when you have 5 mortgages graded as Suitable and a suitable live observation done over video call. All of your cases will be checked in-house prior to submission, and you will receive training on how to package your cases "the Mortgage Mum way". We will help you get there!

WHAT DO YOU NEED TO BUY TO BECOME A MORTGAGE MUM?

You will need:

- Your own laptop. Ideal specification below:
Minimum spec of Intel i5 (series 12) processor
16GB RAM
512GB SSD plus
15.6" screen plus
Windows 11 PROFESSIONAL – The Professional version is required to ensure additional security for the data type stored.
- A mobile phone (which we expect you will already have!). You may want to have a work mobile phone, but this is not compulsory.
- An app to be able to record all telephone calls incoming and outgoing until you reach CAS status.
iPhone App - TapeACall Pro(recommended)
Android App - Cube ACR (recommended)
We would recommend that you use Microsoft Teams or Zoom where possible. Your files need to be saved in your shared drive.
- Stationery (pen, notepad, calculator)
- Printer (not essential but useful)
- Webcam (not essential but useful)
- A Tripod and light for your Mortgage Mum social media videos (not essential but useful)
- A professional photo shoot. We have an exclusive relationship with Stephen Wallace <https://www.stephenwallacephotography.com>, who is an incredible photographer and is very familiar with our brand and how we would like it to be photographed. He has completed the branding shoots for the current team of Mortgage Mums, and subject to your location, he is able to do this for all new recruits.
You are also welcome to use your own professional photographer, and we will send you a specification to ensure your shots are on brand and in line with our requirements.
These photographs will be used on all social media platforms as well as our website.

WHAT ARE THE COMMISSION SPLITS?

Here at The Mortgage Mum, our rewards include wellbeing incentives as well as financial ones.

We have a tiered structure that will be discussed with you on our initial call, dependent on your historic business levels.

WHAT IS THE APPLICATION PROCESS?

The next stage of the process will be to contact our management team on recruitment@themortgagemum.co.uk to arrange a call to discuss your specific situation and your next steps!

We run The Mortgage Mum Recruitment Days bi-annually, however for experienced brokers we are able to accept your applications on an individual basis.