FINANCIAL INFLUENCE

How to become a trusted FinFluencer

A practical program for building trust, visibility, and opportunity online

Program Guide

Designed and delivered by the Real Estate and Mortgage Institute of Canada Inc. (REMIC)

FinFluencer (noun)

A trusted financial communicator whose influence moves behavior, not just attention.

Attention is the new asset class.

It compounds the same way interest does. The professionals who earn it early collect on it for years.

— Joe White

Who This Program Is For

This program is a good fit if you:

- advise, educate, or serve clients on money decisions
- want people to understand your expertise before speaking with you
- care about trust, accuracy, and staying compliant
- prefer systems and structure over guesswork
- want progress that fits alongside a real business and a real schedule

WHAT YOU WILL BE ABLE TO DO CONFIDENTLY

- Position yourself clearly
- Build trust before the first call
- Explain complex ideas simply
- Stay compliant while creating content
- Choose ethe right platforms
- Turn visibility into conversations
- Engage without selling
- Show proof without bragging
- Build a repeatable system
- Track what actually matters
- Plan content with confidence
- Maintain credibility long-term

Program Overview

Who It Is For

- Mortgage professionals
- Life Insurance professionals
- Financial services representatives (insurance, investment, planning)
- Real estate professionals
- Financial educators and planners
- Financial entrepreneurs operating in regulated environments

Time Commitment

- Live session: approximately 90 minutes per week
- Implementation: 3–5 hours per week
- Total weekly commitment: approximately 4–6 hours

Program Format

- 4-week guided cohort
- 1 live session per week
- Tools and exercises completed between sessions
- 1-year access to course materials

Investment

- $997 ($597 for REMIC Alumni)

Program Path

1

Register
Complete the FinFluence Formula

2

● LIVE
Week 1
Going Live:
Getting Setup

3

● LIVE
Week 2
Content Production:
Your Playbook

4

● LIVE
Week 3
Growth:
Engagement & Distribution

5

● LIVE
Week 4 Systems & Scale:
Operating Plan

6

Capstone Project

7

Leave with a 90-day continuation plan

Weekly Breakdown

Your Starting Line (Pre-Live)

Complete the FinFluence Formula course focusing on defining your niche, positioning, platform stack, and first 10 content ideas.

Orientation

Immediate course acces

Diagnostic self-assessment

Tools access

● LIVE

Week 1

Going Live

Creator Lab:

90-minute interactive session focusing on Compliance guardrails, profile setup, and producing your first three pieces of content. Between Sessions: Publish your first 3 posts.

Niche definition

1-1-1 platform stack

Core message framework

Proof asset checklist

● LIVE

Week 2

Content Production

Creator Lab:
90-minute interactive session focusing on your content calendar, batch production workflow, and a platform-specific playbook.

Between Sessions: Batch-produce and schedule next week's content.

Trust Triangle application | Disclosure templates | PARDON compliance system | Profile architecture

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● LIVE

Week 3:

Growth

Creator Lab:
90-minute interactive session focusing on engagement, referral partners, and pipeline.

Between Sessions: Launch engagement rhythm and contact 3 referral partners.

Content Pyramid model | 30-day calendar | HERO structure | Script templates

LIVE

Week 4:

Systems & Scale

Creaetor Lab:
90-minute interactive session focusing on dashboard, revenue integration, and your 90-day operating plan.
Between Sessions: Finalize your 90-day roadmap with tracking live.

Trust Triangle application

Disclosure templates

PARDON compliance system

Profile architecture

Capstone Project

Format: Independent completion of your 90-day plan.
Deliverable: Submit your finalized strategy and certification requirements.

Content Pyramid model

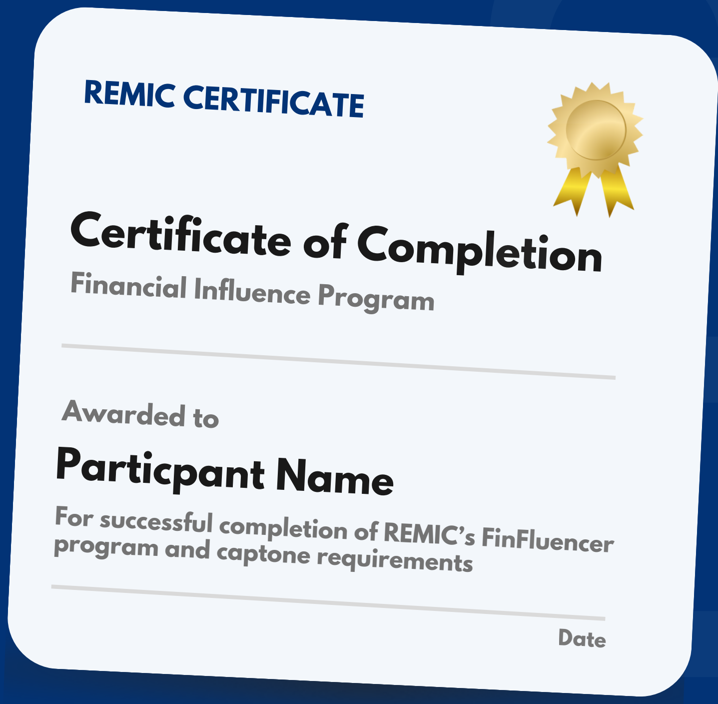
30-day calendar

HERO structure

Script templates

This is a Certification Program

This program is structured as formal professional education, not a content challenge.



EACH MODULE INCLUDES

- 90-minute Live Creator Lab session
- Applied exercises with practical deliverables
- Video instruction with demonstrations

CAPSTONE DELIVERABLE

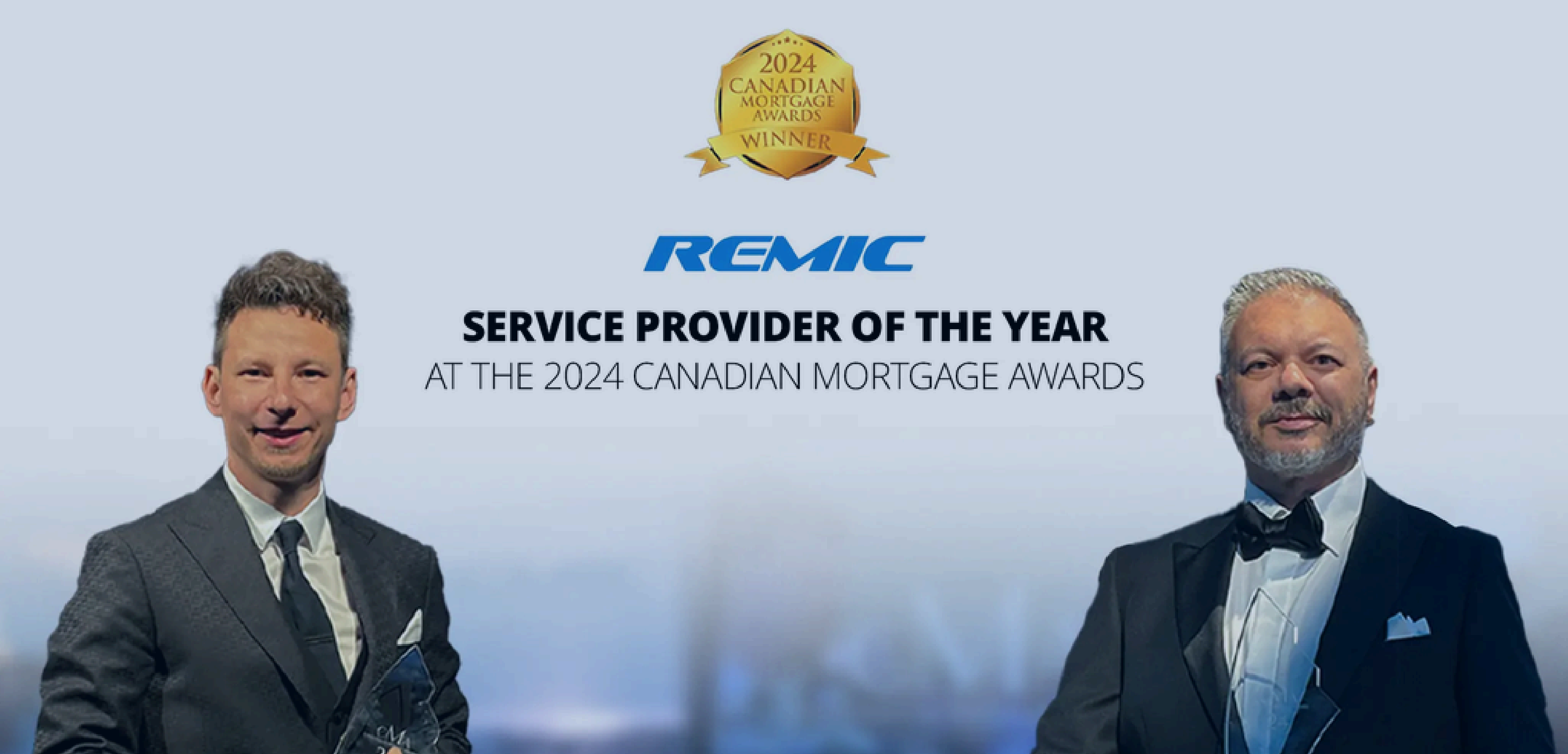
- Audience research and positioning
- Compliance and guardrail framework
- Batch production workflow and content calendar
- Content-to-consultation pipeline
- 90-day operating plan

Delivered by REMIC

Financial Influence is developed and delivered by REMIC, a Canadian education provider serving regulated financial professionals.

REMIC has trained **100,000+ learners** and is known for structured programs built around outcomes, assessment, and certification standards.

- Award-winning provider
- 4.9 ★ Google (2,000+ reviews)
- Licensed educator for mortgage and life insurance education



The 12-Module Curriculum

The Financial Influence program is structured into twelve integrated modules, each building on the last. Together, they move from foundational positioning and compliance to content systems, execution, measurement, and long-term scale.

Each module includes structured instruction, applied exercises, and graded assessment. By the end of the curriculum, participants complete a comprehensive Financial Influence Plan aligned with professional standards.

Module 1

Why Financial Influence

Client behavior has changed in measurable ways. Borrowers, investors, and buyers now research extensively before speaking to a professional, and many decisions are shaped long before the first call or meeting. This module examines what that shift means in practical terms. It breaks down the economics behind attention, trust, and client acquisition, and helps you evaluate whether your current approach reflects how modern clients actually choose who to work with. You will complete a structured self assessment and leave with specific actions that move you forward.

You will learn to:

- Identify immediate, concrete actions that strengthen your credibility and trust positioning
- Analyze how digital research behavior affects client selection in your profession
- Compare the real cost and lifetime value of traditional prospecting versus inbound visibility
- Assess your current digital presence using a structured diagnostic tool

Key Question

When clients find me online, what do they actually see?

Module 2

The Digital Landscape

Before you create anything, you need to understand the environment in which your clients are already making decisions. This module maps where financial clients spend time online, how they research professionals, and how platform demographics differ by product type and client profile. It walks you through a structured competitive audit of your local market so you can identify saturation, gaps, and overlooked opportunities. You will analyze how platforms function across awareness, education, trust building, and conversion, rather than treating them as interchangeable. By the end, you will select one primary platform based on evidence, not preference.

You will learn to:

- Identify where your ideal clients spend time and what they search for
- Conduct a competitive audit of your local market
- Distinguish platforms by their role in awareness, education, and conversion
- Select a primary platform using a decision framework

Key Question

Am I focused where my clients actually are?

Module 3

Compliance and Regulatory Frameworks

Content created by licensed professionals operates under regulatory scrutiny, whether you acknowledge it or not. This module outlines the compliance landscape across Canada and the United States and clarifies what qualifies as education, advice, advertising, and prohibited claims. It provides a practical classification framework you can apply to every piece of content before publishing. You will build disclosure templates, review checklists, and documentation habits that reduce risk while preserving credibility. The goal is disciplined execution within clear boundaries.

You will learn to:

- Understand regulatory requirements for financial content
- Distinguish compliant education from advice and advertising
- Build a personal content review checklist
- Create platform specific disclosure templates

Key Question

Do I understand the rules before I publish?

Module 4 Audience Strategy and Niche Selection

Effective positioning begins with clarity about who you serve and why. This module replaces assumption driven targeting with research based audience definition using interviews, keyword analysis, and real client data. It examines how to select a niche based on opportunity, expertise, and competitive dynamics rather than personal preference. You will develop a concise core message that reflects the problems your audience is actively trying to solve. The result is sharper communication and more relevant visibility.

You will learn to:

- Define an ideal client profile using structured research
- Select a niche based on opportunity and expertise
- Craft a clear, consistent core message
- Build a repeatable audience research process

Key Question

Is my message built for a specific audience?

Module 5

The Psychology of Trust and Authority

Trust online develops through identifiable psychological signals, not repetition. This module examines how credibility forms in digital environments and how first impressions influence long term perception. It expands the Trust Triangle framework and shows how competence, candor, and care can be demonstrated through content and profile design. You will also evaluate behaviors that erode trust, even when expertise is strong. The focus is deliberate credibility architecture.

You will learn to:

- Apply psychological principles of trust to content
- Use the Trust Triangle in messaging
- Design profiles and entry points that build credibility
- Identify behaviors that weaken trust

Key Question

Does my presence earn trust quickly?

Module 6

Content Strategy and Planning

Visibility without structure leads to inconsistency and fatigue. This module teaches you to think like an operator by aligning content with defined business objectives and measurable outcomes. You will build a planning framework that balances awareness, education, trust building, and conversion across a sustainable calendar. It also introduces a content multiplication model that turns one substantial idea into multiple assets. By the end, you will have a repeatable system rather than a posting habit.

You will learn to:

- Align content with clear business goals
- Build a practical content calendar
- Design a content to consultation pathway
- Implement a batch production workflow

Key Question

Is my content built on strategy or impulse?

Module 7

Content Creation Masterclass

Execution determines whether your ideas translate into credibility. This module provides practical frameworks for writing, filming, and designing financial content that demonstrates expertise without jargon. You will learn how to make your reasoning visible by showing calculations, comparisons, and decision processes clearly. It also addresses sensitive financial topics with accuracy and restraint. The objective is clarity that reinforces authority.

You will learn to:

- Write financial content without jargon
- Produce effective short and long form video
- Design visuals that clarify complex information
- Apply the show your work principle

Key Question

Can my audience see how I arrive at decisions?

Module 8

Platform Execution Playbooks

Each platform operates with distinct norms, technical requirements, and audience expectations. This module provides tactical execution guides for major platforms so your strategy translates into disciplined action. You will optimize profiles, structure content appropriately for each environment, and integrate channels without duplication or burnout. Compliance overlays are addressed at the platform level. The emphasis is operational precision.

You will learn to:

- Optimize profiles and entry points by platform
- Execute a focused strategy on your primary platform
- Adapt content across platforms efficiently
- Apply engagement practices that build community

Key Question

Am I using this platform correctly?

Module 9

Community Building and Engagement

An audience has limited value without interaction. This module outlines systems for engagement, response protocols, and collaborative partnerships that strengthen credibility and referral networks. You will learn how to manage direct communication professionally and compliantly while scaling your presence. It also addresses how growth changes operational demands. The goal is durable relationships rather than surface metrics.

You will learn to:

- Build engagement systems that activate followers
- Develop a partner ecosystem for collaboration
- Manage comments and direct messages professionally
- Strengthen referral relationships through shared value

Key Question

Am I building relationships or just reach?

Module 10 Metrics, Analytics, and Optimization

Influence must be evaluated using business metrics, not platform vanity numbers. This module introduces a measurement framework that connects content activity to consultations, applications, and closed business. You will learn how to track attribution, run structured experiments, and interpret performance benchmarks realistically. It also provides a ninety day optimization cycle for disciplined improvement. The focus is evidence based decision making.

You will learn to:

- Track metrics that connect to revenue
- Build a content to revenue attribution model
- Run structured A B tests
- Calculate and report ROI

Key Question

Can I prove this is generating business?

Module 11 Monetization and Business Integration

Visibility must connect directly to revenue models to justify sustained effort. This module outlines how influence supports client acquisition, referral economics, speaking, digital products, and partnerships within regulatory boundaries. It examines pricing leverage created by authority and the operational adjustments required to handle inbound demand. You will build realistic projections based on measurable conversion metrics. The emphasis is structured monetization.

You will learn to:

- Convert content attention into client revenue
- Strengthen referral economics through visibility
- Evaluate secondary revenue streams
- Build realistic revenue projections

Key Question

Where does the revenue enter?

Module 12 Scaling, Systems, and Sustainability

Long term visibility requires systems that reduce friction and prevent burnout. This module focuses on workflow design, delegation decisions, and automation tools that preserve voice while increasing efficiency. You will identify what must remain personal and what can be systematized without damaging credibility. It concludes with a structured ninety day implementation roadmap tailored to different starting points. The goal is consistent execution over years, not bursts of effort.

You will learn to:

- Build systems that prevent burnout
- Delegate and automate strategically
- Create a customized ninety day implementation plan
- Position your practice for long term growth

Key Question

Can I operate this consistently for years?

The Financial Influence Toolkit

The program includes reusable tools and structured frameworks, including:

01	**Trust Triangle**	Defines competence, candor, and care as the three visible trust signals that drive client confidence.
02	**1-1-1 Stack**	Helps you choose one depth channel, one discovery channel, and one direct channel to focus on first.
03	**Pardon Framework**	Compliance operating system for policy, approvals, records, disclosures, owners, and notices.
04	**Content Pyramid**	Turns one anchor piece into 3–5 derivative assets across platforms without reinventing content every week.

05	**HERO Framework**	Gives a repeatable structure for high-clarity content: Hook, Explain, Receipts, Offer.
06	**CAMPS Workflow**	Pre-production brief that locks the audience, message, proof, and structure before you hit publish.
07	**Case File Template**	A compliant story structure for anonymized client scenarios: who, goal, obstacle, options, choice, result.
08	**Partner Pack**	Builds a 3–5 professional collaboration network for co-content, shared audiences, and referrals.
09	**4-Layer Metrics Stack**	Connects activity to outcomes using four layers: reach, engagement, conversion, and revenue.
10	**90-Day Plan**	A sequenced plan for execution after the program: foundation, expansion, optimization.

Enrollment & Next Steps

Register, gain immediate access, and follow a structured 28-day build that ends with a capstone you can use in your practice.

STEP 1 **REGISTER**
Secure your seat and receive program access details by email.

STEP 2 **ACCESS**
Start Module 1 and review the tools and standards before Week 1 begins.

STEP 3 **ATTEND**
Join the 4 weekly 90-minute workshops and the work between sessions.

STEP 4 **CAPSTONE**
Submit your 90-Day Plan to earn certification upon successful completion.

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remic.ca/FinFluence

Questions? 877-447-3642 | support@remic.ca