SaaSTech Servers

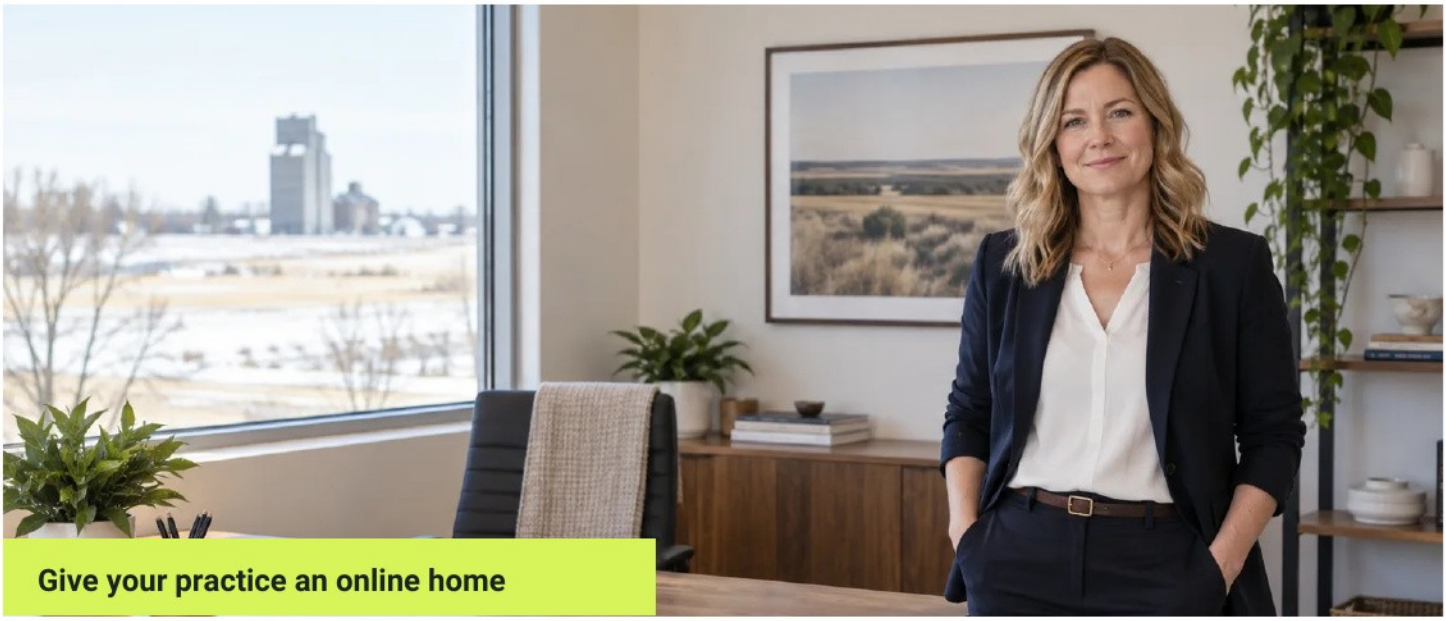
INDUSTRY WEBSITE GUIDE
Workshop workbook

DOMAINS / WEBSITES / BRANDED EMAIL

Financial Advisors & Mortgage Brokers



Start with a clear conversation about your questions.



Explore a practical website plan and download the guide and planning resources.

Microsoft 365 for your organization.

Make every page useful.

- Separate financial and mortgage-service roles
- Explain the first conversation and next steps
- Keep private documents out of public enquiries

Register or transfer your domain to SaaSTech Servers.

saastech.net/industry/financial-advisors-mortgage-brokers

Scan for the guide and downloadable resources.

SCAN TO EXPLORE

SaaSTech Servers

SERVING CANADIAN BUSINESSES
Since 1999

Everything your business needs to move online.

Your name. Your website. Your business email.



DOMAIN CITY

Make a name.

Find your domain name or bring one you own.

WEBSITE VILLAGE

Build your online home.

Start with Website Builder or explore WordPress.

EMAIL TOWN

Look the part.

Use your business name in your team's email.

Not sure where to start?

Take a walk down Main Street.

Explore industry guides, website ideas and practical steps for your business.

Start at **saastech.net**

SCAN TO EXPLORE

Getting started with SaaSTech Servers

Create your free account before contacting support. Keep the detachable record private.

1 Create or sign in to your account

Use an email you can access and follow the secure account prompts. No purchase is required.

2 Keep your customer number and call-in PIN ready

Support may ask for both during a call you initiated through verified Contact Us.

3 Enable two-step verification

Have your registered phone or authenticator device with you when calling SaaSTech Servers; you may need it to sign in or verify the account yourself.

Create My Account | saastech.net/create-account

Contact Us	Account Learning Centre	Delegate access playlist

On Contact Us, check your language/region and currency settings, then use the local contact number shown there.

The Account Learning Centre covers setup and delegation for Website Builder and other services. Choose Work with delegates.

Cut or tear out the card below before sharing this workbook

PRIVATE account reference and call-in authentication

Organization or name _____

Account sign-in email _____

Customer number _____

Call-in PIN _____

Domain names _____

Reviewed on _____

Update your call-in PIN at pin.saastech.net or in My Account after signing in.

Never share your account password or call-in PIN with someone helping manage your services. Each helper should create their own SaaSTech Servers account and receive only the delegated permissions they need. Review purchase/payment and account-security permissions carefully.

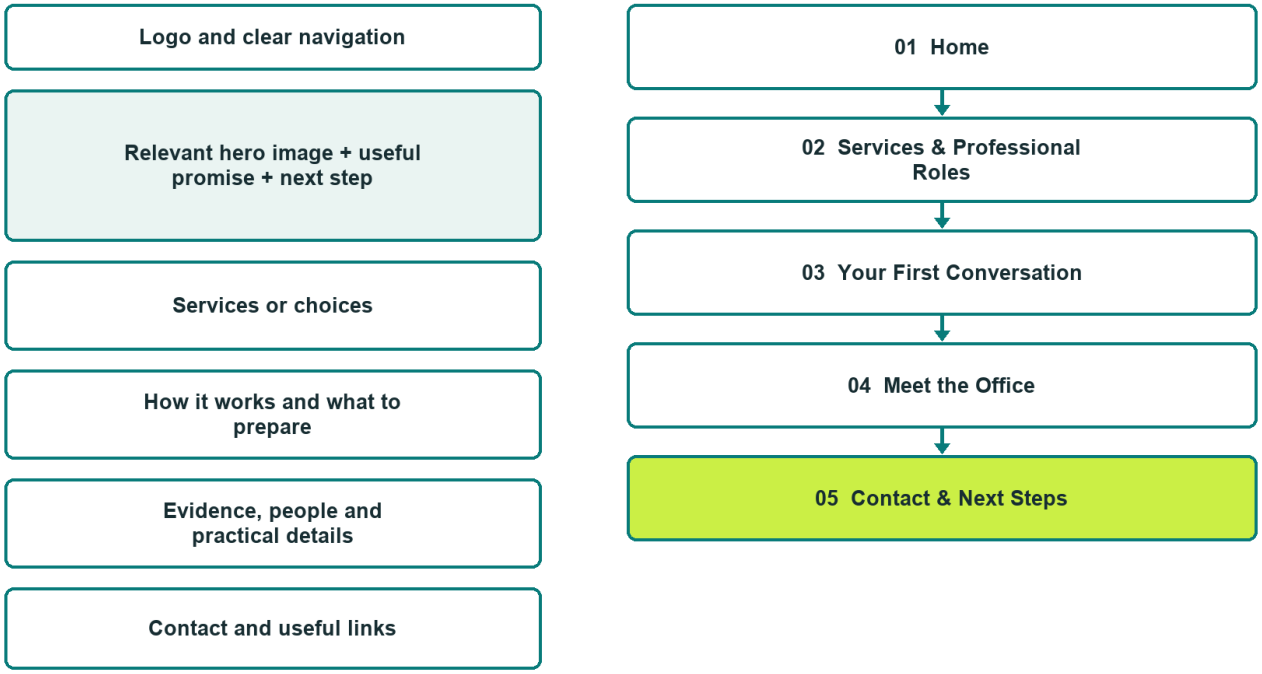
For official support, give the call-in PIN only during a call you initiated through verified Contact Us. Never share passwords, sign-in verification codes or recovery codes.

Do not record passwords, verification/recovery codes, security answers or payment details here. Keep this card safe and cut or tear it out before sharing the workbook.

Use a secure password manager for passwords and recovery information.

Financial Advisors & Mortgage Brokers Website workbook

A practical workshop for a 5-page website. Study the example, plan the content and draft your own version in Word or on paper.



Plan → Draft → Build → Test

Capture edition: five genuine unpublished Website Builder desktop excerpts. Review mobile views on the industry page.

Explore Website Builder and compare plans

Before you build

Your business supplies the facts. Prairie Compass Advisory is a fictional teaching example, not a live service.



- ☐ Request an introductory conversation
- ☐ Verified business identity, services and current contact information
- ☐ A clear enquiry, review and confirmation process
- ☐ Choose original photographs and confirm permission to use them.
- ☐ Keep private customer records out of public website forms.

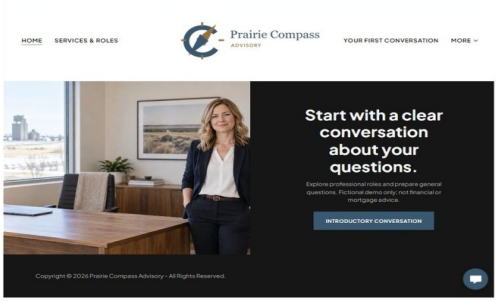
Your audience and the action you want them to take

Facts to verify and people who must approve them

Create your SaaSTech Servers account

01 Home

Give this page one clear job in the customer journey.



Unpublished Website Builder desktop excerpt. Page content continues below.

Sample wording — adapt and verify

Start with a clear conversation about your questions.

Explore the office, understand who handles different enquiries and prepare questions for a first conversation. The team confirms the relevant professional and next step before any service arrangement begins.

Use the relevant page to prepare a focused enquiry, then contact the team to confirm the next step.

Suggested button: Request an introductory conversation

Website advice

Separate verified financial-planning and mortgage roles, explain enquiry steps and direct private documents into approved systems.

Your draft: Home

Write in the voice of your own business. Use facts you can verify, not promises copied from the example.

Headline and short introduction

Main content and details visitors need

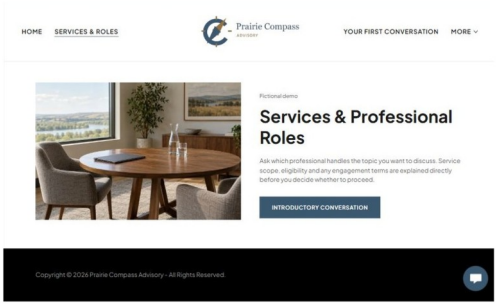
Button wording and destination

Photo choice, permission and facts still to confirm

Partner check: can someone unfamiliar with the business find a useful next step?

02 Services & Professional Roles

Give this page one clear job in the customer journey.



Unpublished Website Builder desktop excerpt. Page content continues below.

Sample wording — adapt and verify

Services & Professional Roles

Ask which professional handles the topic you want to discuss. Service scope, eligibility and any engagement terms are explained directly before you decide whether to proceed.

Discuss any remaining questions with the team and wait for direct confirmation before making arrangements.

Suggested button: Request an introductory conversation

Website advice

Explain only the services and regulated roles the operator has verified. Distinguish general enquiries from personalized advice.

Your draft: Services & Professional Roles

Write in the voice of your own business. Use facts you can verify, not promises copied from the example.

Headline and short introduction

Main content and details visitors need

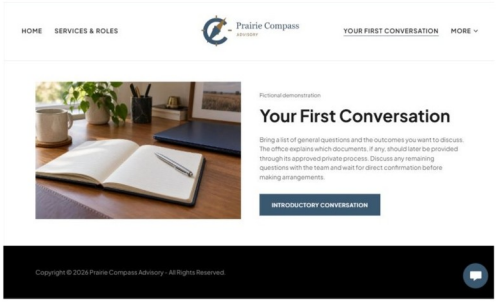
Button wording and destination

Photo choice, permission and facts still to confirm

Partner check: can someone unfamiliar with the business find a useful next step?

03 Your First Conversation

Give this page one clear job in the customer journey.



Unpublished Website Builder desktop excerpt. Page content continues below.

Sample wording — adapt and verify

Your First Conversation

Bring a list of general questions and the outcomes you want to discuss. The office explains which documents, if any, should later be provided through its approved private process.

Discuss any remaining questions with the team and wait for direct confirmation before making arrangements.

Suggested button: Request an introductory conversation

Website advice

Explain the introduction, scope discussion and secure follow-up without requesting account details.

Your draft: Your First Conversation

Write in the voice of your own business. Use facts you can verify, not promises copied from the example.

Headline and short introduction

Main content and details visitors need

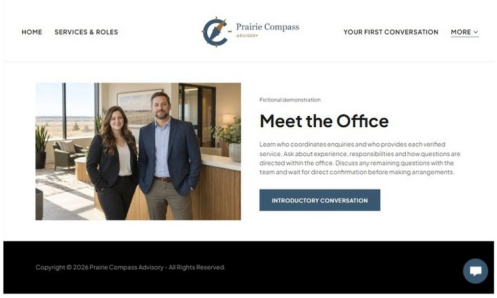
Button wording and destination

Photo choice, permission and facts still to confirm

Partner check: can someone unfamiliar with the business find a useful next step?

04 Meet the Office

Give this page one clear job in the customer journey.



Unpublished Website Builder desktop excerpt. Page content continues below.

Sample wording — adapt and verify

Meet the Office

Learn who coordinates enquiries and who provides each verified service. Ask about experience, responsibilities and how questions are directed within the office.

Discuss any remaining questions with the team and wait for direct confirmation before making arrangements.

Suggested button: Request an introductory conversation

Website advice

Publish verified identities, credentials and responsibilities with permission. Avoid invented testimonials or affiliation badges.

Your draft: Meet the Office

Write in the voice of your own business. Use facts you can verify, not promises copied from the example.

Headline and short introduction

Main content and details visitors need

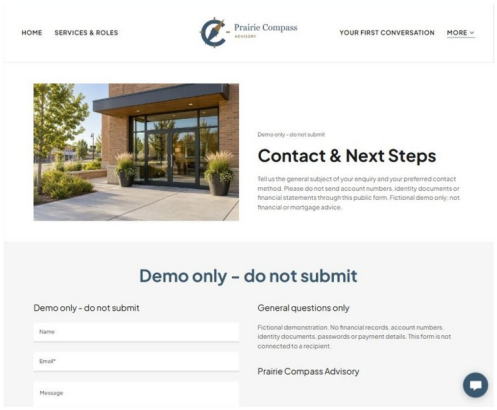
Button wording and destination

Photo choice, permission and facts still to confirm

Partner check: can someone unfamiliar with the business find a useful next step?

05 Contact & Next Steps

Give this page one clear job in the customer journey.



Unpublished Website Builder desktop excerpt. Page content continues below.

Sample wording — adapt and verify

Contact & Next Steps

Tell us the general subject of your enquiry and your preferred contact method. Please do not send account numbers, identity documents or financial statements through this public form.

Discuss any remaining questions with the team and wait for direct confirmation before making arrangements.

Suggested button: Request an introductory conversation

Website advice

Use a minimal general-enquiry form, a reviewed privacy notice and a clearly confirmed response route.

Your draft: Contact & Next Steps

Write in the voice of your own business. Use facts you can verify, not promises copied from the example.

Headline and short introduction

Main content and details visitors need

Button wording and destination

Photo choice, permission and facts still to confirm

Partner check: can someone unfamiliar with the business find a useful next step?

Test before publishing

Review the whole journey on a desktop and phone. Compare these desktop excerpts with the mobile captures on the industry page.

- □ Fictional demonstration only, not financial, tax, investment or mortgage advice. Verify all professional roles and disclosures. Do not promise approval, returns, rates or suitability; never collect financial records through a public form.
- □ Verify each offered service, contact route, location and opening arrangement.
- □ Remove fictional identity, claims, availability and prices before a real launch.
- □ Test every enquiry route and download on desktop and mobile.
- □ Keep sensitive information in approved private systems.
- □ Obtain operator approval for all public wording and image use.
- □ Check every link, form destination, download and confirmation message.
- □ Check logo contrast, hero framing, text sizes and image loading.
- □ Save a named backup and assign a content-review date.

Changes to finish and person responsible

Approval and next review date

Website Builder plans and signup