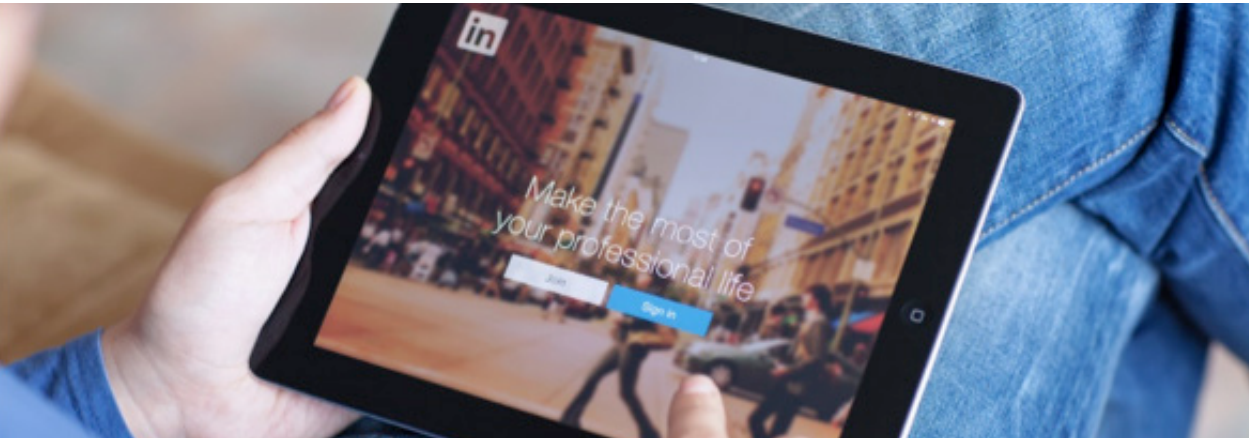


12 Simple Steps to an Effective LinkedIn Profile!

The Average LinkedIn User's Income: \$109,000+



LINKEDIN HAS MANY UNIQUE ADVANTAGES FOR FINANCIAL PROFESSIONALS.

The average LinkedIn user's income is over \$109,000 per year, with a strong baby boomer user demographic. Other groups such as millennials and Gen Xers are also using LinkedIn to network, earn new clients, and gain relevant new education and information.

We all need to ask ourselves: Are we leveraging LinkedIn to better communicate with our clients, prospects, and referral sources?

12

Simple Steps - Easily Build an Effective LinkedIn Profile:

1. Create a login and start with the basics
2. Add photos
3. Have a well-written summary. Be personal!
4. Describe your experiences using action verbs
5. Add relevant skills
6. Seek recommendations
7. Include your education, especially industry certifications
8. Start building a network. Always add a personal note when connecting with LinkedIn members.
9. List groups and hobbies
10. Post content
11. Keep it concise and direct
12. Tell YOUR story

Get Started Today

Call +1 800.233.2834

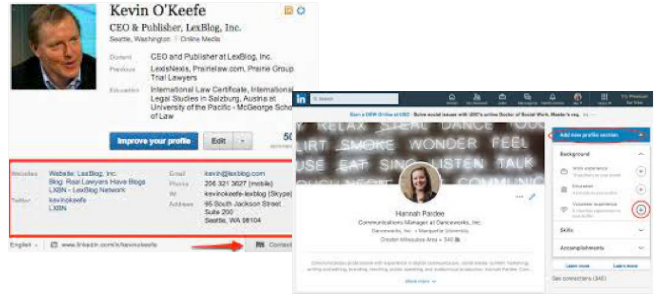
To learn more, visit broadridge.com/advisor

Or email advisorsolutions@broadridge.com

1

Start with the Basics

Make it easy for people to communicate with you. By entering your phone number, location, and email address, you're making yourself more accessible. Consider including a link to a meeting scheduler like Acuity or Calendly.



2

Add Photos

You're the face of your own brand on LinkedIn. We recommend selecting a profile picture that will help set strong brand expectations. Wear a respectable outfit, be well groomed, and smile! Dress as though you are about to meet your most important client for a business meeting. Leverage your family and your pets in pictures. This is professional to you but is also very personal to your clients.

A Hearsay Advisor Cloud study said, "These posts had an average engagement rate of 48 percent, versus 42 percent for corporate posts." By sharing insights into your personal life, you will start to build genuine trust between you and your prospects. They are likely to feel more comfortable to move forward with you as their financial professional.

3

Have a Well-Written Summary

Summaries can be a powerful way to demonstrate your value through LinkedIn. You have 2,000 characters available in this space to explain:

- **Who you are**
- **What you do**
- **Who you help**
- **How you help**

This is your opportunity to provide reasons for potential viewers to continue and include a call to action (CTA). For example, "Let's talk about your financial future. Call me at (555) 555-5555."

Consider including relevant topics for your business like:

- **Investing During Covid-19**
- **Financial Planning**
- **Retirement Planning**
- **Creating a College Fund**
- **Buying a House**

Many potential clients use LinkedIn as a search engine to find the right financial professional.



4

Describe Your Experiences

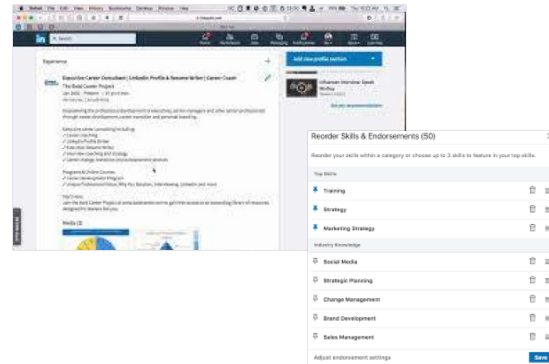
This is where you will post your company name and job title. Provide a description of what you specialize in and any other relevant abilities that differentiate your skillset. Include relevant past work experiences. Demonstrate the qualifications, successes, expertise, and diverse background that make you a powerhouse in the financial services industry. Use action verbs and get creative. What makes you unique?

Instead of just stating “financial professional at xyz firm,” TELL people EXACTLY how you can help them. If you target doctors, your headline could be “Helping medical professionals pay off student loans.” This tells people who you are, the niche you serve, and how you can help!

5

Add Relevant Skills

LinkedIn has a feature where you can add skills that are unique and differentiate you. Give your clients and prospects an understanding of your special skills that will help deliver solutions to their needs through your financial planning process. Be specific!

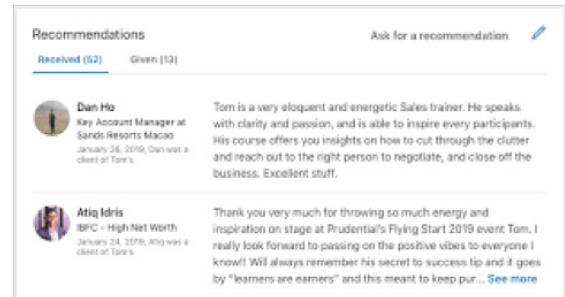


6

Seek Recommendations

IMPORTANT: Your prospects are considering trusting you with their life savings, future, and the future of their family’s well-being. Make sure to ask your clients and referral sources to write testimonials for you. Make it easy for them by providing them with templates / topics that reinforce your story.

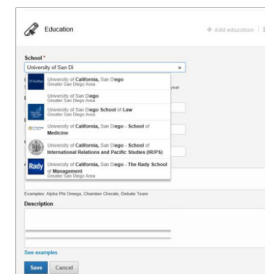
You can also exchange writing recommendations with colleagues or other people in your network. These build social proof and trust among your audience. Ask them to speak to your professional skills and personality.



7

Include Your Education

Be sure to include relevant certifications, industry licenses, and continuing education! People need confirmation that their financial professional is knowledgeable, secure, and dedicated to improvement and continued success. Be sure to add where you went to school, as this could help form connections with fellow alumni.



8

Start Building a Network

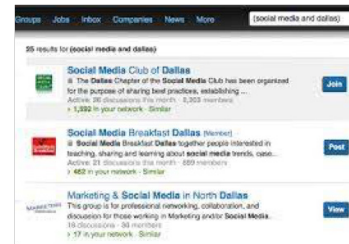
Step one is always to add all your current clients. They will be thrilled to have another connection with you. Next, add your prospects that you're nurturing into becoming clients. After that, whenever you meet someone that might be a correct fit as a client, invite them to join your LinkedIn network with a personalized message.



9

List Groups and Hobbies

Being a member of LinkedIn Groups provides an impression that you're connected and active in your areas of interest. It also telegraphs what your interests and personality traits are -- people buy from people! Do you participate in non-profit groups? Rotary club? Church groups? Coach your daughter's baseball team? This humanizes you, and as mentioned before, this is personal to your clients. It's also a great conversation starter.



10

Post Content

This is very important! Once you have connected your profile to your circle of influence, these people need to receive updates from you! Write your own content or leverage a company like Broadridge that offers services to provide updated FINRA-reviewed content for you to post. Broadridge offers a "set and forget" functionality that allows you to automate posting content.

LinkedIn content has a higher organic reach than other platforms like Facebook. Unlike Facebook, it's possible to gain more traffic to content without paying for ads or "boosting" posts. Consider using relevant hashtags like #personalfinance or #financialeducation to reach more defined audiences.



11

Keep It Concise and Direct

If you're verbose and have a lot of clutter and information on your LinkedIn page, prospects and existing clients may interpret that as being disorganized, difficult to deal with, complicated, etc.

12

Tell YOUR Story

If you remove your name, readers should still be able to know your LinkedIn profile is about you! You shouldn't be able to substitute another financial professional's name and have a similar profile.

BE UNIQUE. Remember to always use WIIFM! Let your viewers know "What's In It For Me?"

Why did you become a financial professional? What makes you different? Who are YOU? People buy from people, so be personal. Write your narrative in the first person, using images and posts to help tell your story. (E.g., tell a story about how you saw your own parents lose a large amount of their retirement savings in the dot.com bubble. As a result, you focus on helping people establish goals and develop an appropriate investment strategy.

[Start with the WHY](#)

(https://www.ted.com/talks/simon_sinek_how_great_leaders_inspire_action/transcript?language=en)

Avoid Cliché Words and Industry Jargon

- Driven, Track Record, Experienced, Results Oriented, Highly, Leadership, Skilled, Passionate, Expert, Deep, Motivated, Creative, Strategic, Successful, Focused, Specialized, Extensive, Relationship (Use Engage, Advocate).
- "My clients trust me;" "I am a people person;" "I am motivated;" "tailored approach;" "my goal;" and "I develop deep relationships." Don't start with "As a financial professional, I help individuals, couples and families grow their assets for the long term." -- Who doesn't do all this as a financial professional... or claim too?

Broadridge Financial Solutions 9/2020

Get Started Today

Call +1 800 233 2834

To learn more, visit broadridge.com/advisor

Or email advisorsolutions@broadridge.com