

7 Financial Advisor Tips for Optimizing a LinkedIn Profile

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More than seven in 10 Americans use some type of social media. Younger adults are the largest audience, but **older generations are gaining ground.**¹

While there are many social media channels out there, not all have something to offer financial professionals when it comes to engaging with clients and prospects. LinkedIn is one social platform that is widely regarded as a valuable resource for advisors and other business professionals. In fact, a greater percentage of higher income earners use this channel. **Half of adults earning \$75,000 or more are on LinkedIn compared to just 21% of those who earn between \$30K and \$74,499.**¹

Just because you have a LinkedIn profile, however, doesn't mean you're leveraging the platform to its fullest potential. It's important to avoid common LinkedIn mistakes and to **present your profile as if it were your online business card**. Before you scour the internet looking for interesting articles to share or post your own nuggets of wisdom, make sure you've optimized your LinkedIn profile using these seven tips.

1. Choose the Right Profile Photo

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One of the first impressions a prospective client will see on LinkedIn is your profile photo. **Avoid selfies and keep it professional.** Choose a well-lit headshot image with a genuine smile, and make sure there isn't anything distracting in the background. You may already have a professional headshot or other appropriate photo, but it's still important to check with your firm's leadership or compliance department for guidance on what is acceptable.

2. Include a Header Image

The header image is featured at the top of your LinkedIn page when someone visits your profile. Consider using this featured image as a way to communicate your specialties. For example, simple graphic text like "Retirement Planning | Estate Planning | Annuity Solutions" can quickly convey your niche. If you're not comfortable selecting or creating graphics on your own, think about enlisting the help of a graphic designer. Your company's marketing department may also have graphics already available. Whatever you do, **make sure you have permission to use any images.**

3. Select Your Name and Tagline Summary

This seems straightforward enough, but some advisors miss opportunities to get found by clients and prospects based on their headline. Consider using the name by which you're known by clients. Is it Bob or Robert? Maggie or Margaret? Also include any credentials such as whether you're a CPA, CFP, PFS, etc. **Don't miss opportunities to get creative with your headline by using relevant keywords that are descriptive of your expertise.** Are you simply a "financial planner," or would the words "I help investors achieve guaranteed lifetime income" be a better reflection of your services?

4. Customize Your LinkedIn Address

LinkedIn automatically generates a generic web address for your page. This automated URL might contain your name with dashes and a host of random numbers. To help **optimize your URL for SEO purposes**, edit it to only contain your name when possible. If your name is already taken, add other information such as your title, firm or certification. Some LinkedIn URL examples include:

- <http://www.linkedin.com/in/JohnSmith>
- <http://www.linkedin.com/in/JohnSmithAcmeFinancial>
- <http://www.linkedin.com/in/JohnSmithCFP>
- <http://www.linkedin.com/in/JohnSmithFinancialAdvisor>

5. Update Your About Section

LinkedIn allows you to expound on your capabilities and expertise in the About section. Rather than making it sound like a resume and coming across like a sales pitch, **place the emphasis on how your clients benefit from your services.** This is an area where you can add a bit more personal touch by sharing your heart and how fulfilling it is to see your

clients approach the future with confidence. Listing specialty services or niches is appropriate when presented in the light of helping clients achieve their financial goals.

6. List Experience, Accomplishments and Volunteerism

Even though you shouldn't focus on blatantly selling yourself, **clients still want to know that you have the skills, qualifications and knowledge to provide helpful advice.** List relevant job experience along with your responsibilities, placing the most emphasis on your current position. Your education section can also demonstrate your accomplishments, as can licenses and certifications. An area that is sometimes overlooked is volunteerism, but it could be another way to **show your human side.** Do you coach your child's Little League? Serve on the board of a nonprofit? Volunteer for a cause you care about? Be sure to share about it.

7. List Skills and Manage Endorsements

You are able to further feature specific skills under the Skills and Endorsements section, such as financial planning, 401(k) consulting, employee benefits planning, etc. **The endorsements portion still causes confusion for some advisors** due to regulations prohibiting certain types of statements. The Securities and Exchange Commission announced in late 2020 that it adopted modernized marketing rules for investment advisors; however, there are still many restrictions that require certain disclosures, oversights, and disqualification provisions.² It's best to check with your compliance department before enabling the endorsements feature on your LinkedIn profile.

Now that your LinkedIn profile is optimized, it's time to join in the conversation by sharing posts and engaging with others. For additional tips on setting a social strategy, be sure to **check out our advanced resource as part of our Acceleration Series for advisors.** You'll gain practical insights into how to deepen client relationships and connect with prospects. Simply click the link below.

Sources

¹ Pew Research Center, [Social Media Fact Sheet](#), April 7, 2021

² U.S. Securities and Exchange Commission, [SEC Adopts Modernized Marketing Rule for Investment Advisers](#), December 22, 2020