



What Every Financial Advisor Should Put in Their LinkedIn Profile:

A Definitive Guide to Making a
Great First Impression with Potential Customers

At Commonwealth, we talk frequently with advisors who are excited to ramp up their use of LinkedIn, so they can better prospect for new business and network with other professionals. One of their most common questions is, “I’ve updated my profile and had Compliance approve it. Now what do I do?” The first thing we do at that point is pull up the profile to take a closer look. Generally, we see a picture, a name, a current practice name, one or two previous employers, and the required disclosures. Sure, this is a good start, but if you really want to make a great first impression, you want to have a “full” LinkedIn profile.

Think of LinkedIn as Your Virtual Receptionist

How often do you think a potential client or strategic partner is going to call you or stop by your office before they check you out online?

Keep in mind: When people search your name or company name, your LinkedIn profile—not your website—is more likely to be the top search result they see.

These days, the likely answer is not very often. For this reason, we recommend thinking of LinkedIn as your virtual receptionist. You need to put as much care into setting up your profile as you do the physical reception area in your office. You wouldn’t staff your office with a receptionist who couldn’t answer any questions, right? Why would you have a profile that doesn’t offer any information potential clients and partners would want to know?

Keep in mind: When people search your name or company name, your LinkedIn profile—not your website—is more likely to be the top search result they see.

What Makes a LinkedIn Profile a Good One?

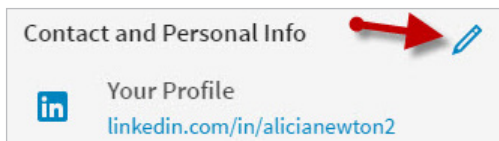
Your profile needs to be accurate and complete.

Photos

- **Profile picture.** A recent professional headshot is best.
 - Professional doesn’t mean you have to hire a photographer; dress in business attire and then have someone you know take a picture with a good phone or digital camera. (Make sure there’s no one else in the photo with you.)
 - If your picture is 15 years and 30 pounds out of date, you are going to lose credibility with people who already know you. And people you meet who later go online to check you out will be confused at the discrepancy as well. Be genuine!
- **Background image.** Add a background image to enhance your profile.
 - Remember: LinkedIn is a professional network, so you should use a photo that portrays your business.

LinkedIn public profile

- Be sure to customize your LinkedIn URL. This information is located on the right-hand side of your profile and is the address you will use to link your profile to your e-mail signature and your website.



- You should use your name (or a close variation, which LinkedIn will suggest if your name is already being used by someone else), as this will greatly enhance your ranking in search engine results when someone is looking for you through an Internet search.

Headline

- The headline is also an important part of your profile, as it will appear in search results.
- Most users think this needs to be your job title, but you should write a unique headline that showcases who you are and what separates you from your competition.

Contact information

- Be sure to add your company website in the URL field and select Company from the dropdown menu.

A screenshot of the LinkedIn 'Website URL' field. The text 'www.commonwealth.com' is entered in the input box. To the right is a dropdown menu labeled 'Company'. Below the input box is a blue link that says 'Remove website'.

Summary

- The Summary is the most prominent content section in your profile and provides a great opportunity for you to connect with your audience, so make sure it's well written and speaks to your target market. Because of its visibility, we recommend including:
 - A couple of sentences on what you do and who you work with, and
 - A sentence or two on your philosophy of working with clients, where your passion for people comes from, or a few words on why you got into financial services in the first place.

Experience

- Providing details on your current and previous jobs gives a great snapshot of your expertise.
- Use bullet points here, as visitors to your profile are more likely to skim through this section. Highlight your primary responsibilities in a way that facilitates scanning.
- Dig deep, as if you're putting together a résumé. Include any responsibilities relevant to your current work that you can think of. Office management and customer service skills are just as important as asset management and financial planning services.
- But don't overthink it. Most advisors haven't had to put together a résumé in quite some time, so this process can feel overwhelming. Brainstorm bullet points, document them, and move on before analysis paralysis sets in!

Education

- Be sure to list any degrees you hold, along with your alma mater.

Volunteer experience

- We suggest you fill in these sections. Your efforts to give back to your community highlight another side of you, completely unrelated to the business end of things.
- This is a great way for people to feel a bond with you outside of the financial world.

Skills

- This section is useful in improving your search engine results, as it is based on the keywords you select to reflect your skills.
- Remember that, for regulatory reasons, you may not be permitted to display endorsements. (You can disable these easily through LinkedIn.)

Accomplishments

Certification
Course
Honor and Award
Language
Patent
Project
Publication
Test Score
Organization

Under LinkedIn's Accomplishments section, you can also highlight awards and certifications, list courses you've taken, upload presentations and published materials, and more. Run through these sections, which are listed on the right side of your profile, underneath "Add new profile section," to see if you have content you can use to fill in these areas.

Note that if you have a presentation or publication that is more relevant to a particular position you've listed in the Experience section, you can now upload right to that section.

Media

Add or link to external documents, photos, sites, videos, and presentations.

Upload

Link to media

 [Supported formats](#)

Don't Forget About Compliance!

Finally, remember to check with your Compliance department prior to posting any information to your profile. Profile content is generally considered static, so it will need to be approved *prior* to being made available to the general public.



Founded in 1979, Commonwealth Financial Network, member FINRA/SIPC, is the nation's largest privately held independent broker/dealer-RIA, with headquarters in Waltham, Massachusetts, and San Diego, California. The firm supports 1,710 independent advisors nationwide in serving their clients as registered representatives, investment adviser representatives, and registered investment advisers, as well as through hybrid service models. For more information, please visit www.commonwealth.com.

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