

About Section

People have limited attention spans and within seconds an individual will determine whether they would like to engage with you or click off, never to return.

Your LinkedIn summary gives you the ability to differentiate yourself from the competition. It should be engaging & succinct, passionate & personal.



Idea Share!

Hire a professional writer who can convey what makes you “you” – and your services unique and desirable.

Not sure who to hire?
Bob Anders & Kim Albano are professional writers who’ve created hundreds of engaging LinkedIn profiles for advisors who want to be seen as approachable, likeable *and* irresistible.

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Your summary is one of the most important components of your LinkedIn profile. It gives you the opportunity to leverage personal branding to communicate what makes you unique and different from other advisors. ***Only the first few lines of your summary appear by default, so choose your words wisely to hook your readers and drive them to expand it to read more.*** As we all know, you never get a second chance to make a good first impression!

Your summary is your story, experience, passions, hobbies and interests – the core of who you are and what motivates and inspires you. When you have a clear understanding of your personal brand and are aligned with that brand and its mission, you will attract clients who are also aligned with it.

Your Summary should be written in the first-person. It’s more intimate. It’s like having a conversation with the reader, creating a deeper connection. It can be written in paragraph form or titled sections, the choice is yours! But always make sure it is ***compliance approved***.

Topics to consider when crafting your summary:

- ✓ **Who or what inspired you to become an advisor?** Was it a moment in your life or do you have a love of finances and helping people? Was your mom/dad an advisor, or were you inspired by another advisor? Did you grow up with financial challenges?
- ✓ **What do you provide your clients?** Is it unique products/services? Unique approach? Comprehensive financial planning?
- ✓ **What drives you today?** What motivates you? Do you love providing advice, guidance, education to individuals?
- ✓ **Who do you love working with?** Is it families? Independent women? Accountants? Business owners? C-suite executives?
- ✓ **Who do you serve best?** Do you serve your community? A niche market? Business owners? Entertainers? Pre-retirees/retirees?
- ✓ **What are you passionate about?** Who are you beyond an advisor? Are you passionate about sports, your children/grandchildren, mindfulness, fitness, philanthropy? Explain why. It will help others connect more deeply with you.
- ✓ **Call to Action** – Describe how you’ve helped others in a way that has prospects saying to themselves, “Whoa! I need to talk to this advisor, (s)he could probably help me out!” Therefore, be sure to include your email address and phone number.

The Art of Telling a Convincing Story:

People remember stories – it's what connects us. We all have a story, and a well-told story will set you apart. In order to tell a convincing story, you must make a connection with the reader, build rapport and credibility, explain how you aspired to change things for the better and how that changed you, and what successes resulted from it. Just remember to remain authentic – your actions must support your statements.

Ultimately, Answer These Questions:

- Who are YOU and what's YOUR story?
- Why should I trust YOU?
- What makes YOU so different from every other advisor?

Consider the Following:

Who or what inspired you to become an advisor? Try using some of the terms/phrases, below.

Growing up...

Example: "Growing up in a family that valued hard work and serving the community..."

Watching...

Example: "Watching my father, a pediatrician, treat patients for half a century, I developed..."

Today...

Example: "Today, [YOU OR YOUR TEAM NAME] continues to grow alongside the clients we serve."

Because...

Example: "I became a financial advisor because I know the power of true financial planning, and I was passionate to help others."

What drives you today? What motivates you?

Example: "I find the greatest reward in providing advice, guidance and education to..."

Who do you love working with? Is it families? Independent women? Accountants? Business owners? C-suite executives?

Who do you serve best? Niche Market; Pre-retirees/retirees. If involved in your community, is there something you can describe about your involvement?

Example 1: “We’re proud to serve active and retired farmers, business owners who’ve had liquidity events, entrepreneurs and non-profit organizations.”

Example 2: “I would love to connect with individuals who are...”

What are you passionate about?

Sports; your children/grandchildren; mindfulness; fitness; philanthropy? Who are you beyond an advisor?

If you are a big fan of a sports team that is local to your market, it could work to your benefit. Review the list below for inspiration!

Example 1: “Diehard sports fans! Born and raised as a Tampa girl, so GO BUCS and BOLTS!”

Example 2: “I love spending time with my family, especially my grandchildren!”

Example 3: “I enjoy being involved with several charities...”

Call to Action – Describe how you’ve helped others in a way that could relate to prospects.

Example 1: “Impacting the lives of generations of clients and our community through non-profits.”

Best Practice: Conclude with your email address and phone number.

Decide on a Format Once you have all of your key elements prepared, you have a choice to simply tell the story in a paragraph and/or layout your elements in sections with headers. The best summaries are the ones that are a combination of an intro paragraph or two and then 3-4 section headers supported by bullet points.

Personal Interests:

- | | | |
|--------------------------|-----------------------|--|
| ○ Animals/Animal welfare | ○ Food/Food critic | ○ Snowboarding |
| ○ Archery | ○ Football | ○ Sports |
| ○ Automobiles | ○ Golf | ○ Surfing |
| ○ Aviation | ○ Hockey / Ice Hockey | ○ Swimming |
| ○ Baseball | ○ Kayaking | ○ Tennis |
| ○ Basketball | ○ Lacrosse | ○ Travel/Exploring exotic countries |
| ○ Boating | ○ Martial arts | ○ Volunteer Work/Community Involvement |
| ○ Books/Reading | ○ MMA | ○ Wine/Wine tasting |
| ○ Coaching | ○ Mountain biking | ○ Yoga/Meditation |
| ○ Cooking/Nutrition | ○ Music | |
| ○ Craft Beer | ○ Painting | |
| ○ Cycling | ○ Photography | |
| ○ Education | ○ Reading | |
| ○ Fishing | ○ Running | |
| ○ Fitness/Exercise | ○ Skiing | |