

Improve your online presence in three easy steps

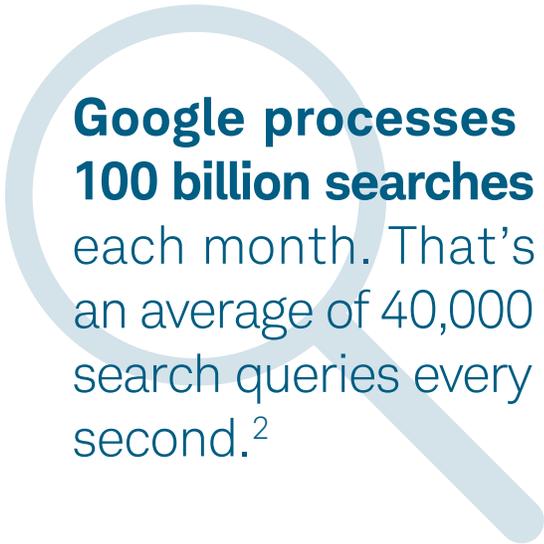
Take advantage
of new ways to
deepen client
relationships and
generate referrals



Not so long ago, trusted relationships started with a handshake. But now most potential clients get their first impression of you long before they shake your hand—because they’ve already looked you up online.¹

A new first impression

When potential clients find you or your firm, whether through a referral or an online search, what does your digital presence offer them? Does it make the same kind of first impression you’d want to make in person? Does it clearly explain how you differ from other advisors? Does your digital approach educate people and help them feel comfortable and welcomed, offering a convenient source of helpful financial information and perspective? An expertly crafted digital presence can do all that and more, while keeping you relevant in the medium that most people now rely on for communicating.



Google processes 100 billion searches each month. That’s an average of 40,000 search queries every second.²

Find your voice

Building a compelling personal online profile isn’t difficult. Assuming your firm has a professionally designed website to back you up, the best next step is to develop your personal profile on LinkedIn®, the world’s largest network for making business connections. You can do it in these simple steps:

- 1 Establish your personal brand**
- 2 Refine your digital profile**
- 3 Cultivate your connections**

As with all marketing communications, work with your firm’s compliance officer to understand the guidelines and policies your firm employs for social media.

“In this day and age, digital media dominates the customer experience. That’s why it’s critical to have a well-crafted digital presence.”

Susan Forman
Senior Vice President
Charles Schwab

To learn more about social media compliance, check out our white paper, [*Compliance considerations for social media*](#).

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Establish your personal brand

Especially as the fiduciary rule takes effect, it's more important than ever for you to stand out to clients and prospects. That means you need to differentiate on a set of characteristics and messages specific to you—not just your firm, but you. In other words, you need to establish a dependable personal brand.

A core story

Actually, you already have a personal brand—a consistent impression left in the minds of others—but if you're like most people, you probably aren't using your brand intentionally. By cultivating and communicating your brand story, you can give potential clients an intriguing portrait of what you offer as a professional and a person. The key is to give viewers a sense of who you are, what's important to you, and why they should bring their business to you.

To start, take some time to review your life and career. Explore questions like these to help uncover your core story:

- **What influenced you growing up? What influences you today?**
- **What drew you to finance? Why did you become an independent financial advisor?**
- **What do you love about your work?**
- **What are your personal interests and passions?**

You'll use the answers to key questions like these to create a digital profile that includes personal facts, influences, motivations, and sentiments in just a few sentences. This approach to your profile gives clients and prospects multiple ways to engage with and attach to you. Your profile becomes sticky—it will stick in the minds of your viewers.

A digital meeting place

The world's largest professional network, LinkedIn is the best place to promote your digital profile. But don't think of it as simply posting an electronic resume. LinkedIn is a meeting place—a place to create connections, deepen professional networks, and leverage your connections' networks. A place to open doors and stay in touch.

Stand out from the rest



About 4 out of 5 advisors already have profiles on LinkedIn.³ That's why it's crucial to optimize your profile there.



With more than 450 million members—more than 130 million in the United States alone⁴— LinkedIn offers a huge number of potential connections for advisors who stand out from the rest.

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Refine your digital profile

The LinkedIn template is designed to help you convert your personal story into a showcase of your professional accomplishments and client approach. Creating a basic profile is easy. In fact, you probably already have one. Chances are, though, that you could make your profile work harder for you with a few simple improvements.

Upgrade your photo

Your profile photo is your virtual handshake. It can help you get up to 21 times more views than profiles with no photo.⁵

- Make sure your photo is both professional and friendly.
- If possible, have a business photographer take your headshot against a solid backdrop.
- Wear work clothes. Face toward the camera and look directly into it. Smile, as you would when you meet a new client.

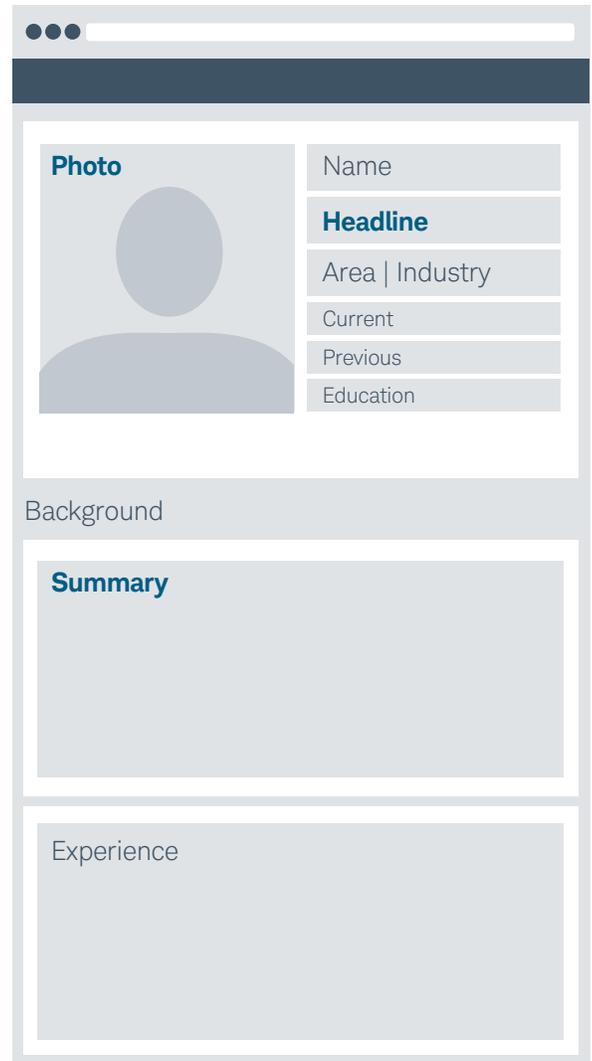
TIP: When you post your photo, crop it to make your face fill most of the frame. That helps you look approachable while also keeping the viewer's focus on you rather than the background.

Expand your headline

The headline just below your name—a sort of personal tagline—is as important as your photo. It's the first thing most viewers will read about you, and LinkedIn weights it heavily when compiling search results.⁶

- Many people use their job title as their headline. But since that approach simply duplicates the title shown in the Experience section, consider using more than one important label to describe yourself.
- For example, rather than a headline that says "Financial advisor," you might expand your headline to "Financial advisor, wealth manager, independent advisor."
- Include your area (city/state) and industry just below your headline to increase your results when people search by city and industry.

TIP: In your previous work experience, which appears below your name and headline, include only those jobs that map to your current position. Exclude any others.



Craft your summary

The Background portion of your profile includes the following sections: Summary, Experience, Education, and Honors & Awards. Many users make the mistake of skipping the Summary and going straight to Experience.

- If you don't have a Summary section, you should add one. It helps with search terms, and it's a great way to round out your LinkedIn profile by adding a topline summary of what you do and who you are.
- This is the place where your personal brand can come to life. Don't simply summarize your career. Use your summary to feature your values and approaches, your personality, what you care most about, and what investors can expect on a personal level when they become your clients. These are the characteristics that will make prospects want to meet you.
- Make your summary about 45 to 50 words long. You can go somewhat longer if needed, but a shorter summary could hamper your search results.
- Reorganize the sections of your profile, if needed, to make your summary appear just after your photo and headline. Typically, the Experience, Education, Organizations, and Honors & Awards sections come next.

TIP: Set your profile to full public view (in Settings). This is the only way your profile will appear in the results of major search engines.



Tips for a readable profile

- Write simple, clear sentences.
- Speak plainly. Avoid industry jargon that your family or neighbors wouldn't understand.
- Be personable. Include how you feel in addition to what you do. For example, an advisor with special-needs expertise might say, "I want my clients to rest easy knowing they have a solid plan in place to provide lifetime care and support for their special-needs child."



The word on keywords

Keywords are words that people use when searching. Inserting them in your LinkedIn profile will help you turn up in search results.

- Important places to insert keywords are the Headline, Summary, Experience, and Skills sections of your profile.
- Make sure these sections include several instances of the words that centers of influence and prospects may use to find you.
- Check other advisors' profiles—particularly the Skills section—to make sure you've captured all words that describe you.

For example, your keywords might include *investment advisor*, *financial advisor*, and *wealth manager*. Consider also using words from the Advisor Services ad campaign, such as *independent*, *fiduciary*, *accountable*, and *trust*.

3

Cultivate your connections

Creating a strong profile is the most basic way to start reaping benefits from LinkedIn. But there's much more. The bigger opportunity lies in expanding your sources of new referrals, helping referrals learn about you, and giving prospects—and potential employees—what they need to feel comfortable contacting you. Here's how.

Connect with everyone you meet

Send everyone you meet an invitation to connect on LinkedIn. This will deepen your network and allow your connections—and their connections—to see your posts and likes. Here's how to connect.

- Type the person's name into the search bar at the top of the LinkedIn homepage.
- Make sure you've selected "People" on the drop-down menu to the left of the search bar.
- Scan the search results, and click on the person you're seeking.
- From there, click the Connect button, which takes you to a screen where you can write a note reminding the person of your meeting and inviting them to connect.
- Click Send Invitation.

Extend your network

The broader your network, the further your reach. Consider these ways to start expanding your connections.

- Use LinkedIn to connect with clients' spouses and adult children and grandchildren. This is a great way to cultivate relationships and meet needs across your clients' families.
- Look at your connections' networks to see if you know anyone you could invite to connect.
- Contact your first- and second-level connections—especially centers of influence—to ask for introductions to their networks. This is best done in person, when possible, so you and your connection can make a plan that benefits both of you.
- Make it a goal to connect with all the staff in your center of influence networks, from the front office to the back office. It's bad form to send LinkedIn invitations to those you don't know, so start with people who'd recognize you and expand as you meet additional staff.
- Search on your school and the years you attended to find people with whom you could reconnect and start a conversation. Add professional organizations, community organizations, and your children's schools to your network as well.



Ready for reunion

Many people search for their college and university alumni, so make sure to include your schools and the years you attended them. That will help people find you and help you start conversations with those who do.



In good company

Follow the Schwab Advisor Services company page to get the latest research updates, business tips, and market perspectives. And make sure your firm has a LinkedIn company page as well.

Raising awareness of the independent difference

The first key to an effective digital presence is a clear, compelling story that differentiates you from your competition. To help you tell your story, we've launched our largest ever advertising campaign to raise awareness of the independent difference.

The ads feature real independent advisors and highlight values like trust, accountability, commitment, and the fiduciary standard.

Look for campaign ads in the *Wall Street Journal*, *Forbes*, *The Economist*, *Barron's*, *CNN Money*, *MarketWatch*, *Bloomberg*, and more. And make sure your digital presence is as strong as it can be so you can take advantage of the increased awareness the advertising campaign could produce.

Together, we can educate investors and support your success.

Investors trust independent advisors with over \$4 trillion of their money. That's some serious trust.

Who you put your trust in matters. Independent financial advisors are professionals held to a fiduciary standard. They seek to serve, not sell. That's why we support independent financial advisors, like the ones you see here. And why we think it's worth your time to learn more.

FindYourIndependentAdvisor.com

Charles Schwab is an advocate for over 7,000 independent financial advisors who are passionately dedicating themselves to helping people achieve their financial goals.

charles schwab
Own your tomorrow.

Become a thought leader

Once you've created a sticky personal brand story and built a compelling digital presence, you can start developing ways to provide ongoing information and perspective that help establish you as a financial thought leader for your clients, colleagues, and prospects. Naturally, you'll want to work with your compliance officer and within your firm's social media policy for posts and third-party material. Also, consider these steps:

- Join some of the more than 2 million⁷ groups active on LinkedIn.
- Follow some high-profile influencers in financial services.
- Look at the active discussions in your groups and on your feed. Then, in keeping with your firm's social media policy, take part in conversations in which you can provide a valuable thought-leadership perspective.

Using LinkedIn strategically—by telling an authentic story about yourself, crafting a powerful profile, and pursuing connections—can help you nurture your referral network, help referrals learn more about you, and encourage prospects to seek you out.

Sources

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