

Build a Powerful Social Media Presence

Designed for Financial Professionals with Busy Schedules, Not Tech Experts!

BEING A FINANCIAL PROFESSIONAL ISN'T EASY!

You must successfully navigate through volatile markets, tax law changes, client service requests, and managing your own team members, all while further developing your business! Technology is constantly changing, which means many of the processes you use on a daily basis are constantly changing, too.

The key is to make technology work for you. Simple strategies like using social media have proven to assist top financial professionals in earning additional, highly qualified clients. Many top financial professionals even leverage automated social media processes to help them build their brands.

92% of financial professionals that use social media have acquired at least one client from social media in 2020. This number is up from 63% in 2013. Now consider the average LinkedIn user's income of over \$109,000 per year. Are you missing out on a massive opportunity?

HOW WE CAN HELP

At Broadridge Financial Solutions, we understand the important role that marketing plays in the success of today's top financial professionals. The competition for new clients (and competition for your current clients) is intensifying every single day.

Word-of-mouth marketing and word-of-mouth referrals are simply not enough anymore. New financial advice opportunities are opening up daily. Successful investors are doing more research than ever prior to moving their money. We will show how you to bolster your digital presence, so that you can gain and retain more clients!

Building a social media presence can be broken up into three steps.

1. Awareness
2. Engagement
3. Acquisition

This guide will break down these three steps, which are designed to help you achieve your business goals through social media.

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Step 1

Awareness

Did you know that the fastest-growing demographic on social media is the baby boomer generation?

Baby boomers are a well-known group with many high net worth investors, and they also happen to be active on social media. With the average LinkedIn user income over \$109,000 a year, it's no wonder that is the type of client many financial professionals are interested in. Without building awareness with them through social media, it will be tough to reach them.

At Broadridge, we understand the importance of staying top of mind with a prospect. When a life event happens such as changing careers or retiring, your name needs to be the first one they think of.

What does awareness look like on social media? We recommend starting on LinkedIn and adding all your prospects to the LinkedIn network. Send them an invite with a personalized message that shows you care. There is a significant community of business professionals ranging from lawyers, teachers, CEOs and every other profession.

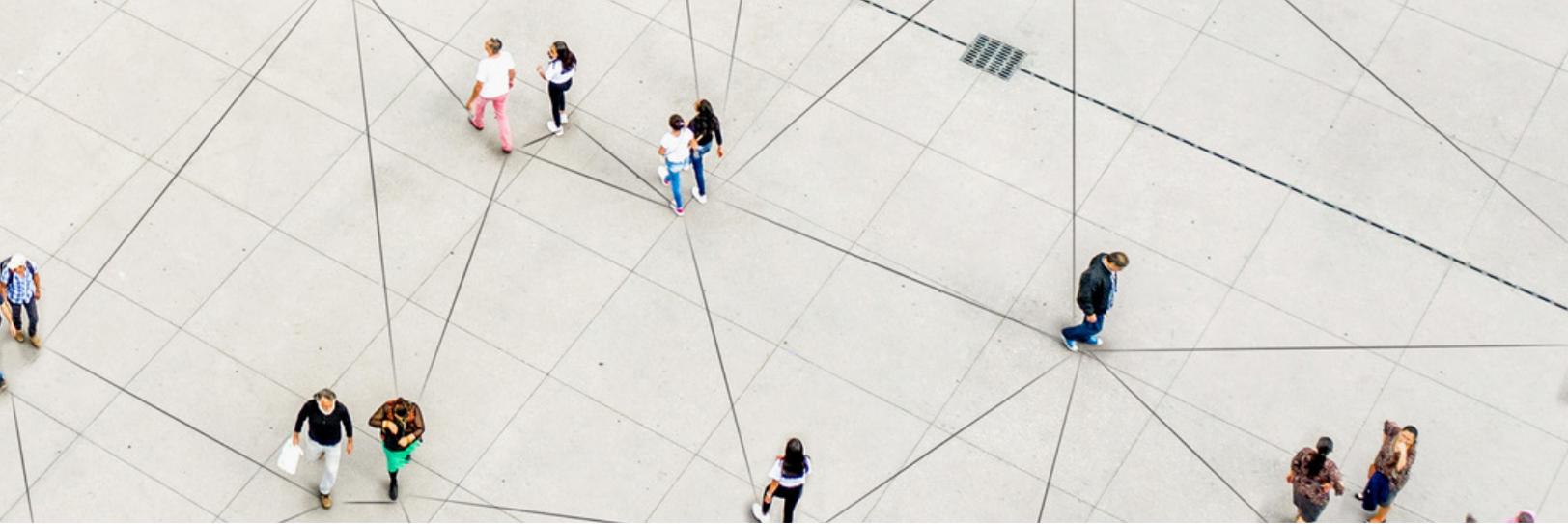
The best way to get targeted exposure is to consistently post relevant content that resonates with your target audience. If you can answer your prospects' financial questions with the right content, they'll be more inclined to become clients.

The key is that you aren't looking to sell your services, but rather educating and providing value to your social network. If the market becomes volatile and the next day you post an article about why it declined and what to expect in the coming weeks, you'll be seen as a thought leader and an expert in the field.

The beauty of social media is that you can schedule one single high-value post, and it could potentially reach thousands. Awareness doesn't have to be all about articles, however, as content could include videos, calculators or even audio recordings.

Use social media to show your personality and demonstrate who you are as an individual. Suppose your office has a birthday party for one of your employees. Go ahead and snap a pic and post it on LinkedIn! This will show your prospects you are human, rather than a robot disseminating a constant flow of financial information.

Consider creating awareness of yourself on multiple platforms such as Facebook and Twitter. There are many social media websites but start by focusing on the one or two social media channels that your prospects actively follow. Doing this will focus your efforts and prevent you from being spread too thin.



To Begin: Add your prospects to your LinkedIn network via connection requests. Focus on adding people within your specific sphere of influence. If you specialize in working with doctors, send connection requests to doctors on LinkedIn.

The first step is to make an introduction and educate your clients and prospects. Selling will come later.

Share relevant content about financial topics and current events. The Broadridge content library, with **2,500+ pieces of FINRA reviewed content including articles, calculators and videos**, will help you build rapport, inspire / influence, and then persuade people to act!

Share client milestones on LinkedIn. Remember events like birthdays, which demonstrates that you care about the personal side of your clients. While LinkedIn is our number 1 recommendation, other social media platforms such as Twitter and Facebook are quickly coming to the forefront of financial information and education.

According to CNBC, the U.S. can expect a wealth transfer of \$68 trillion in the next 25 years. The baby boomer generation is transitioning, and they're getting ready to pass their money on to the next generation — millennials. Much has been said about the millennial generation and younger generations like Gen Z, but the biggest takeaway is that younger people want to be able to connect with you in multiple ways.

Connecting with millennials is where Twitter, Facebook, and even platforms like Instagram and Snapchat, come into play. If you are committed to producing unique, high quality content and are committed to keeping up with multiple social media channels, you will have a better chance of attracting the next generation of investors.





Step 2

Engagement

The process of building a social media presence does not stop with Awareness. The second step is Engagement, and it might be the most important. Many financial professionals are afraid to directly engage with others through social media. Broadridge provides FINRA-reviewed content to spark engagement, but you must do more than simply post to your social media accounts.

The Awareness portion is surface level and places your brand on other people's radar. After that happens, it's critical to ENGAGE with connections and try to forge relationships on social media.

Commenting on articles that are shared by connections is a great way to start a respectful conversation with a prospect. Posting a vote about the latest hot topic in the financial world can also get people talking. Another great example could be tweeting out questions and interacting with the people who answer.

Examples of Engagement:

- Commenting on articles that connections share
- Tweeting out questions and responding to the people who answer

Clients experiencing life events, like the birth of a child, soon realize that they need financial guidance. That's when they might think back to the financial professional who shared their article and wrote them a personalized note on LinkedIn.

The big picture is the same for all these ideas since it all revolves around compelling people to act. It doesn't have to be about something financial. One simple idea could be posting a photo of your recent vacation and asking connections where they like to travel.

Also, LinkedIn has a higher organic reach than other platforms like Facebook. Unlike Facebook, LinkedIn isn't a "pay to play" marketplace. You can gain more traffic to your content without paying for ads or "boosting" posts.

Consider using relevant hashtags like #financialadvisor or #financialfreedom to reach more defined audiences.



Step 3

Acquisition

Once financial professionals have built Awareness and Engaged with their connections on social media, it's time for the Acquisition step.

The most efficient method to take advantage of the Acquisition step is to drive social media traffic to pages on your website with Callouts (i.e. Calls to Action or CTAs). Common examples of calls to action include **“Have a Question?”**, **“Click Here to Send a Message;”** **“Free eNewsletter Signup;”** **“Click Here to Schedule an Appointment;”** **“Free Risk Assessment;”** **“Sign Up for a Complimentary Consultation;”** etc.

Be sure to Link your social media articles directly back to your website and to list your website URL on your LinkedIn profile. Your website is likely your most visible marketing tool. It's important to leverage that visibility by turning your website into a hub of high-quality trusted resources.

Link your social media articles back to your website. As people surf LinkedIn and click on your relevant content, they will be taken directly to your website. Once prospects are on your website, they will be immersed in your brand's advantages.

Remember that **83% of referrals** will do anonymous research on your website before communicating with you. **52% of this group** will choose not to communicate with you if they do not like what they see. If your site is difficult to navigate, if it doesn't inspire trust, if it looks like it was built decades ago, or if the messaging does not appear to be a fit for their needs, you're unlikely to get an appointment.

LinkedIn has higher organic reach, higher quality filters and group choices, and you can drill down further in targeting your preferred niches. The 12 simple steps below will help you build a results-oriented LinkedIn profile that can establish you as a thought leader and build your business.

These tips can help you grow your internet presence. We will all be left behind if we fail to adapt to the changing digital world. As the saying goes, “if you're not e-visible, you may be invisible to others.”

DOWNLOAD THE FREE TOOLKIT TODAY!

Contact us today to learn how we work with top financial professionals and use digital marketing to help them reach and exceed their goals.

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Building a Social Media Profile Tool Kit

How to build a LinkedIn profile: Start with the basics

- Add a photo
- Have a well-written summary
- Describe your experiences
- Add relevant skills
- Seek recommendations
- Include your education
- Start building a network
- Groups and hobbies
- Post relevant content

This list will provide you with a foundation to start successfully engaging with people over LinkedIn. Enter your phone number, location and email to give people a general understanding of what you do. First impressions matter.

Add a Photo

You are the face of your own brand on LinkedIn. We recommend selecting a profile picture that will help set strong brand expectations. Wear an appropriate 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 very personal to your clients.

A Hearsay Advisor Cloud study showed: “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.

Have a Well-Written Summary

Summaries are listed below your headshot and headline on LinkedIn and can be a powerful way to demonstrate your value. You have 2,000 characters available in this space to explain who you are, what you do, who you help, and how you help. This is your opportunity to provide reasons for potential viewers to continue and also include a call to action (CTA).

You can also add relevant keywords like “financial marketing” or “retirement specialist” in this section. Many potential clients use LinkedIn as a search engine.

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 skills that differentiate your skillset. Include relevant past work experience. Demonstrate the qualifications, successes, skills and diverse background that make you a powerhouse in the financial services industry.

Instead of just including “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 debt and achieve their financial goals.” This tells people who you are, the niches you serve and how you can help!

Add Relevant Skills

LinkedIn has a great feature where you can add skills that are unique to you. Give your clients and prospects an understanding of your skills and how they will specifically solve their needs through your financial planning process.

Seek Recommendations

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

You can also exchange written recommendations with colleagues or other people in your network. These build social proof and trust among your audience.

Include Your Education

Add where you went to school. This could help form a connection with a fellow alumnus! Besides education, always include relevant certifications, industry licenses and continuing education. People want confirmation that their financial professional is knowledgeable and is dedicated to honing his or her craft!

Start Building a Network

The first step is to add all your current clients. They will be thrilled to have another means of communication with you. Next, add prospects that you are nurturing into becoming clients. After that, whenever you meet someone who might be a correct fit as a client, invite them to join your LinkedIn network with a personalized message.

Groups and Hobbies

Being a member of LinkedIn Groups reinforces the impression that you are connected, networked, 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? Etc.? This humanizes you.

Post Relevant Content

This is arguably the second most important step. Once you have connected your profile to your sphere 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. Some services include "Set and Forget" functionality to automatically post relevant content.

Keep It Concise and Direct

Subconsciously, your prospects and clients may draw parallels between your page and your personality. If you are verbose and have a lot of clutter and information on your LinkedIn page, it might cultivate a perception of you as being disorganized, difficult to deal with, complicated, etc.

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Tell YOUR Story — this is the difficult part

If you remove your name, readers should still be able to know your LinkedIn profile is about you! You should not 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 — 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 as a teen you watched your parents lose some of their retirement savings in the dot.com bubble. Relate how that led you to a career focused on helping people establish goals and develop an appropriate investment strategy.

Always 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;" "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?

