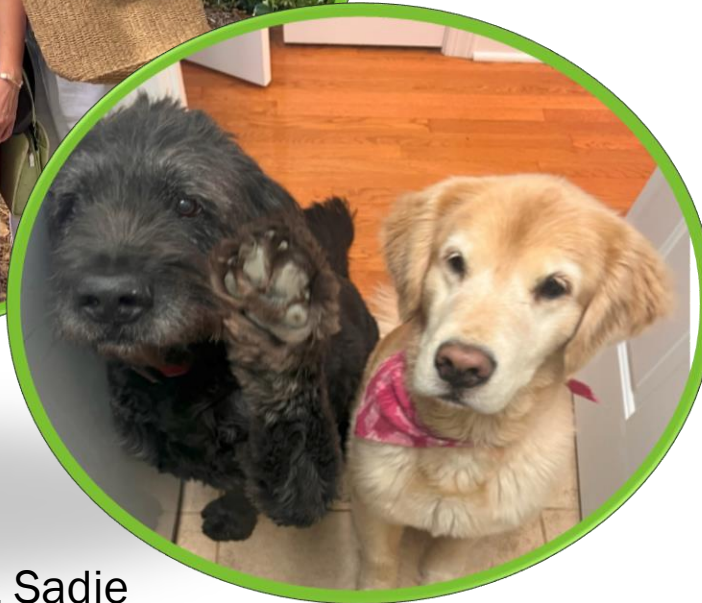


# The 9 Biggest Mistakes Advisors Make on Social Media + How to Fix Them





Bear & Sadie



# Jennifer Hallmark

Director of Marketing



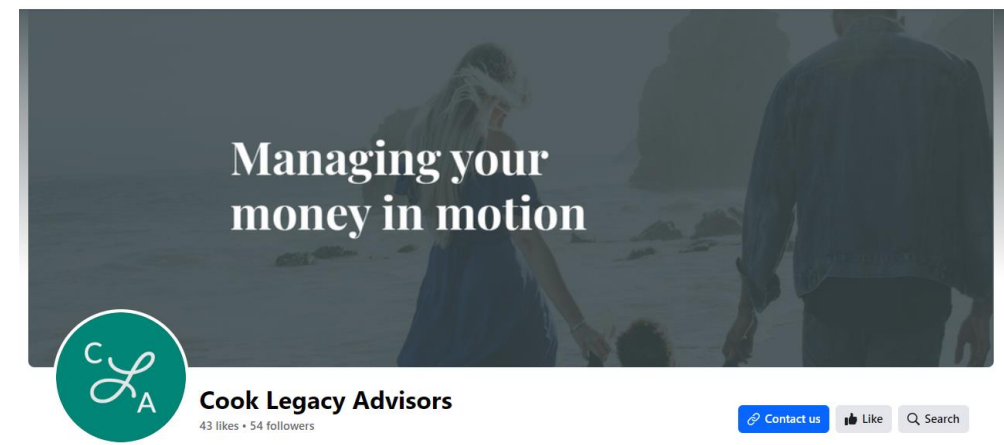
vCard



FRG Socials



74% of people follow businesses on Facebook and consumers are more likely to do business with a brand they follow on Facebook



Source: Khoros Accessed 2023: <https://khoros.com/blog/facebook-business-page-best-practices>

# Google Searches Show Social Media at the TOP

LogMeIn123 ClientWorks LPL Resource Center Gainfully ACT MOD Resource Library - F... 2021 Marketing Or... frgis.quickba:



Kim Ramchandani



All

Images

News

Videos

Shopping

More

Tools

About 169,000 results (0.46 seconds)

<https://public.websteronline.com/people/kim-ramch...>

**Kim Ramchandani, CHFC® | Webster Bank**

Kim has 13 years' experience in investment services. She is a Chartered Financial Consultant.® Kim was chosen as a Five Star Wealth Manager in 2017, 2018, and ...



<https://www.linkedin.com/kimramchandani>

**Kim Ramchandani, ChFC - Webster Investments - LinkedIn**

Wallingford, Connecticut, United States · Senior Vice President, Financial Consultant · Webster Investments

As a Webster Investments Financial Consultant, I provide investment management, retirement planning, and insurance planning through tailored strategies ...



<https://www.facebook.com/kimramchandani>

**Kim Ramchandani, Senior Vice President Financial ...**

Kim Ramchandani, Senior Vice President Financial Consultant, Wallingford, Connecticut. 208 likes. I have 13 years' experience in investment services and...




**92% of your prospects**

will enter your name in a search bar to learn more about you.

Social Media profiles usually show up toward the top.

# #1


Not having an ADVISOR-VOICED  
Facebook  Business Page



kim ramchandini

All Images Videos News Shopping More

Showing results for kim ramchandani  
You originally searched kim ramchandini




Webster Bank

<https://www.websterbank.com> › bankers › kim-ramcha...

Kim Ramchandani, CHFC® - Banker

Kim Ramchandani serves as the relationship manager and lead teams of experts to streamline the banking process. For powerful, & personalized banking, ...




Facebook · Kim Ramchandani, Senior Vice President Financial Consultant

210+ followers

Kim Ramchandani, Senior Vice President Financial ...

Kim Ramchandani, Senior Vice President Financial Consultant, Wallingford, Connecticut. 210 likes · 1 talking about this. I have 13 years' experience in...



LinkedIn

<https://www.linkedin.com> › kimramchandani






Kim Ramchandani, ChFC® - Webster Investments


Wallingford, Connecticut, United States · Webster Investments

As a Webster Investments Financial Consultant, I provide investment management...


Experience: Webster Investments · Education: The American College of ...

Search Facebook







Webster Investments™



Kim Ramchandani, Senior Vice President Financial Consultant

210 likes · 213 followers



**IS Advisor**  
**Facebook Business Page**  
Set up with Advisor's First and Last  
**and**  
DBA

Google

paul ha cornerstone

All Images Videos News Shopping More

LinkedIn · Paul Ha  
250+ followers

**Paul Ha - Cornerstone Wealth Partners, LLC**  
New York City Metropolitan Area · Cornerstone Wealth Partners, LLC  
I am dedicated to helping individuals and businesses develop financial and investment...  
Experience: **Cornerstone** Wealth Partners, LLC · Education: Rider ...

Facebook · Cornerstone Wealth Partners - Paul Ha Owner  
200+ followers

**Cornerstone Wealth Partners - Paul Ha Owner**  
Paul Ha, owner of **Cornerstone** Wealth Partners goes over what it means to be a financial planner. Located in Lacey Township, NJ **Cornerstone** Wealth Partners is...

Search Facebook

Cornerstone Wealth Partners

Cornerstone Wealth Partners - Paul Ha Owner  
192 likes · 201 followers

Liked Search

**Independent Advisor  
Facebook Business Page**  
Set up with Advisor's First and Last  
**and**  
DBA

# Content for Advisor-Voiced vs. DBA-Voiced Pages

## Advisor Voiced Content

- “Day in the Life” personal pics - with family, at a sporting event, traveling, showing a hobby or interest, volunteering...
- Upcoming webinars or seminars you’re presenting
- Videos that show your personality and expertise
- Original thinking and wisdom that will attract prospects



## Company Brand Voiced Content

- General announcements – new hires, new services, etc.
- Pictures of the team
- Links to the website
- Videos about the practice







# Social Patrol Includes Facebook Business Page


**proofpoint**  
Digital Risk & Compliance

## Patrol Account Installation

You can install Patrol instantly on all of the following services:

 Facebook  
[Install on](#) my Pages

 Twitter  
[Install on](#) my Accounts

 LinkedIn  
[Install on](#) my LinkedIn Member Accounts  
[Install on](#) my LinkedIn Page  
[Install on](#) my Groups

[Privacy Policy](#) | [Terms of Service](#) | [Support](#)

Copyright © 2024 Proofpoint, Inc.

# #2

Not having an UPDATED &  
OPTIMIZED LinkedIn  Profile

# Power up your Profile Checklists

## Power Up Your LinkedIn Profile

**1** Header image: A professional headshot of Adam Hartzell.

**2** Professional name: Adam Hartzell, LPL Financial Advisor.

**3** Headline: LPL Financial Advisor located at Diamond Credit Union - I help my clients work to put all pieces of their financial puzzle together by using my customized process that I have developed during my career.

**4** About section: A detailed bio of Adam Hartzell, LPL Financial Advisor, located at Diamond Credit Union.

**5** Skills section: Lists skills such as Investment Strategies, Retirement Planning, and Financial Advisory.

**6** Experience section: Lists professional experience, including LPL Financial Advisor at Diamond Credit Union.

**7** Privacy Settings: A link to view Adam's live profile on LinkedIn.

**8** Visibility of your profile & network: A link to view Adam's live profile on LinkedIn.

**9** About section: A detailed bio of Adam Hartzell, LPL Financial Advisor, located at Diamond Credit Union.

**10** Privacy Settings: A link to view Adam's live profile on LinkedIn.

### Tips to Enhance Your Profile and Improve Search Engine Optimization

1. Utilize a **header image** that emphasizes your brand, the region, a personal interest, or the building where your office is located. Incorporate your logo and your slogan.
2. Use a professionally taken **headshot**.
3. Your **professional name**, title and designations.
4. Write a niche - oriented **headline** using key industry terms (refer to skills section below).
5. Add a **License or Certification** to potentially receive 10% more followers.
6. Create a **Personalized URL**.
7. **About Section**
  - Provide a more **in-depth** description of who you are and what you do
  - Include the skills, accomplishments, and specialties that **make you unique**.
  - Show results - give **specific examples** of how you've helped clients
  - Add a **personal element** - explain why you are passionate about your career
  - **Call to action** - end your summary by inviting people to connect with you
  - Required Disclosure: LinkedIn profile disclosure info (under About section)
8. **Skills Section**
  - Use **keywords** and **search** terms likely to appear in search results in your headline and About section
  - Find **keywords** that LinkedIn uses to help those searching for your service/skillset.
  - Use those keywords found in their search drop-down in your headline.
  - Make sure your top 3 skills that you want to be known for are checked so it signals to LinkedIn your core areas of expertise and raises your status to "All Star".
9. **Experience Section**
  - Write a brief description of your current role then add the required disclosures to the Experience section of your profile. (2000 character limit)
10. **Privacy Settings**
  - Don't give away free advertising to other advisors! Consider these 3 settings:
    - Who can see you as a connection (Visibility section)
    - Profile viewing options (Visibility section)
    - People also viewed (Preferences section)

## Power Up Your LinkedIn Profile

**1** Header image: A professional headshot of Paul Ha.

**2** Professional name: Paul Ha, 2nd.

**3** Headline: Cornerstone Wealth Partners and LPL Financial Advisor helping individuals pursue financial success through investing, advising & insuring.

**4** About section: A detailed bio of Paul Ha, LPL Financial Advisor, located at Cornerstone Wealth Partners, LLC.

**5** Skills section: Lists skills such as Investments, Planning, and Trading.

**6** Experience section: Lists professional experience, including LPL Financial Advisor at Cornerstone Wealth Partners, LLC.

**7** Privacy Settings: A link to view Paul's live profile on LinkedIn.

**8** About section: A detailed bio of Paul Ha, LPL Financial Advisor, located at Cornerstone Wealth Partners, LLC.

**9** Experience section: Lists professional experience, including LPL Financial Advisor at Cornerstone Wealth Partners, LLC.

**10** Privacy Settings: A link to view Paul's live profile on LinkedIn.

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  - Use **keywords** and **search** terms likely to appear in search results in your headline and About section
  - Find **keywords** that LinkedIn uses to help those searching for your service/skillset.
  - Use those keywords found in their search drop-down in your headline.
  - Make sure your top 3 skills that you want to be known for are checked so it signals to LinkedIn your core areas of expertise and raises your status to "All Star".
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    - Who can see you as a connection (Visibility section)
    - Profile viewing options (Visibility section)
    - People also viewed (Preferences section)

# LinkedIn Profile Power-Up

## Profile Photo

- Selfies not recommended
- Professional headshot
- Recent and not overly touched up
- Don't show your elbows – *it's called a headshot for a reason!*

## Cover/Background Photo

Simply use your logo on a sophisticated background or a incorporate a photo (team, building exterior, lobby, iconic city landmark) that ties into your brand and business





# #3

**No Niche or Identified COIs**

## Niche Marketing – Social Media

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*If you try to be everything to everyone, you'll be nothing for nobody*

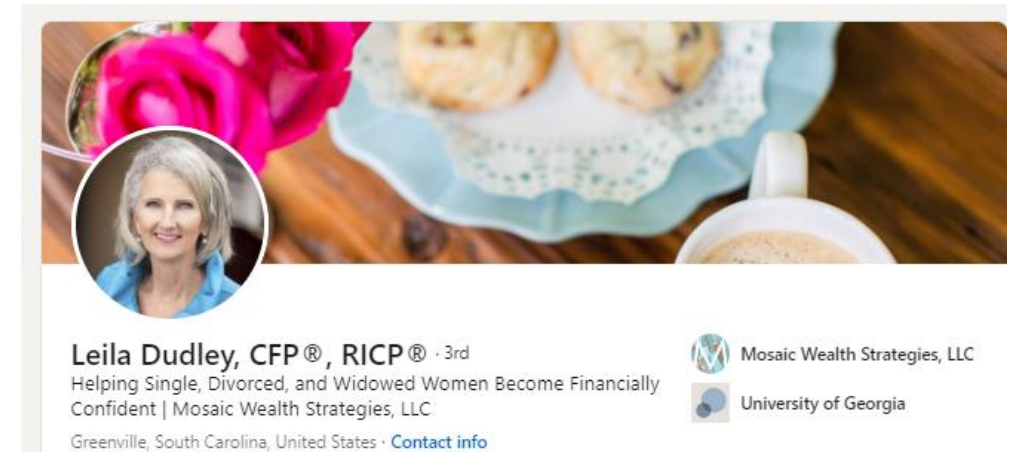
- According to CEG Worldwide research, **70%** of top financial advisors (*defined as those earning at least \$1 million annually*) **have a niche**
- Having niche will benefit you in knowing exactly where to **find** your target market, where to **invest resources**, and how to **approach** said target market – *especially on social media.*

# Niche-Oriented Headlines on LinkedIn

---

👉 *If carefully worded , this will NOT alienate clients outside your niche* 👉

- Wealth advisor at LPL Financial helping **CORPORATE EXECUTIVES**, including **ABC Company** professionals and retirees, work toward building financial success with investment solutions and retirement planning
- Wealth manager helping **PHYSICIANS** build their financial legacy in **CHICAGO**
- Financial advisor for **SMALL BUSINESS OWNERS** in the **BOSTON** area
- Financial planner helping **SINGLE, DIVORCED, AND WIDOWED WOMEN** become financially confident



# Niches Marketing – Social Media

---

## Potential Niches:

- Small business owners and entrepreneurs
- Tech industry professionals
- Medical professionals
- Women in transitional life changes (divorcees, widows, etc)
- LGBTQ+ Community
- Execs and corporate professionals
- Military and Veterans
- Clients with specific religious or ethical beliefs



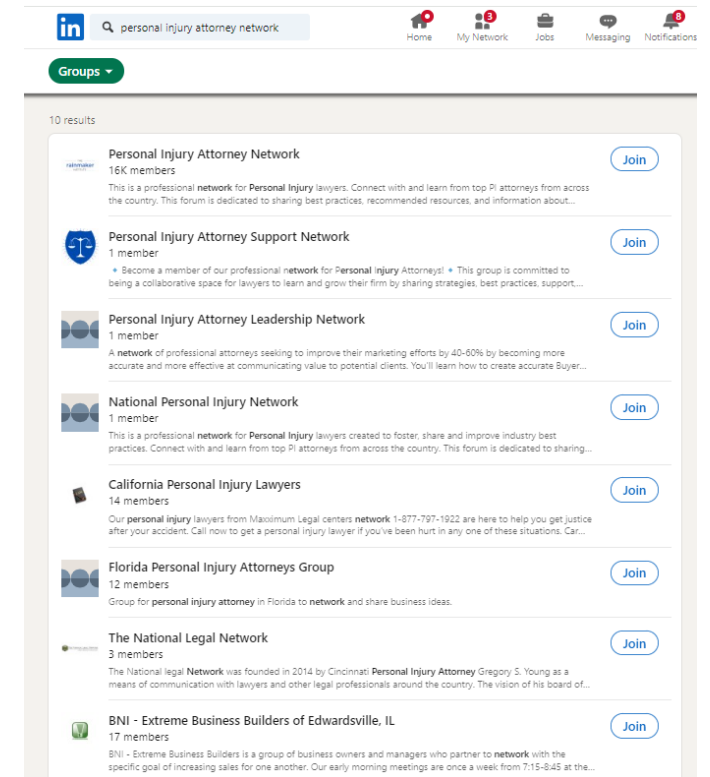


# Centers of Influence – Social Media

## COIs for Referrals to Financial Advisors:

- Attorneys (estate planning lawyers, divorce lawyers, corporate lawyers, personal injury lawyers)
- Human Resource Managers
- Bankers
- Mortgage Brokers and Real Estate Agents
- Insurance agents
- CPAs and Tax Advisors

## Join LinkedIn Groups



# #4

You Are Boring 🙄

If your audience won't LAUGH, LEARN, or gain something of VALUE, you'll become a "scroll past" account. Not good. 🤔

Just saying *"Read my blog"* or *"Here's what we can help you with"* isn't going to do anything. 🙅

**COMMENTS ARE CURRENCY ON SOCIAL MEDIA!**

# Examples



Add your own  
insights and  
perspective  
with 3<sup>rd</sup> party  
blog articles



Be funny!

"Social security is about to be gone in the next 10-15 years" - Brian age 24 who thought he heard that on the news 🤔

I am sure all of you have heard something similar in the past few years 🤔

But... this isn't really the truth ❌

According to CNBC "Social Security reserves are projected to be fully depleted by 2035"

The key word here is reserves

These reserves only account for about 24% of the benefits that are paid out yearly

The other 76% comes from yearly payroll taxes

So are you not counting on social security as millennial?

Check out this weeks blog post to see why I think social security will still be here for our retirement

#personalfinance #millennials #socialsecurity



Offer valuable content –  
case study (766 Comments)

If you are a high income earner, you could hit financial independence SOOOOO much sooner than you realize.

It seriously isn't that complicated and everybody says they want it, but you just don't make the changes to make it happen.

That's where a coach comes in.

Stop saying you want financial freedom early if you aren't willing to put in the work.

If you want it, then figure it out and go for it because it's seriously within your grasp.

So, for those of you who are serious about this, let me see if I can help you out 🙌

I have done a case study on how I helped a client get these results:

- > 12x net worth
- > Get into the zero % tax bracket
- > Retire up to 15 years early
- > Still buy their dream house
- > Still take the family vacays they want

All while not even messing around with investment returns and not even saving more money than they were, just saving it better.

They invested a lot of money into this process because they were SERIOUS about getting the result, and their investment in themselves paid off big time.

So, if you want access to that case study:

1. Like this post
2. Comment "Case Study"
- \*\*update\*\* connect and dm me! LI won't let me see all the comments and I miss you!

372 · 766 Comments

#davelowellposts  
372 · 766 Comments



# Be more engaging on Social Media!

*What will people make a **comment on** or **reshare**?*


- Use **HUMOR** 😂
- Educate, adding *your unique* **PERSPECTIVE** 🔍 on third party content/blogs
- Use photos of **FACES**
- Offer **VALUE** 🔥 by sharing content – “*Like & Comment and I will send this \_\_\_\_\_*” (*case study, video, course, blog article, white paper*)
- Post on local **EVENTS** for your target audience
- Use catchy **VISUALS** (*FMG or FRG can help with this!*)

# #5

Not being PERSONAL

# Personal posts tied back to business

*“Just like relationships, it’s easy to look back on our finances and wonder where did the time go?”* 📌



**Jamie Baraldi** • 2nd  
CEO at Peak Wealth Partners | Expert Financial Management for ...  
[Book an appointment](#)  
2mo • 🌐

🌟


Reflecting on the wisdom shared by my clients, “the days are long and the years are short.” 📖

As a financial advisor, I’ve witnessed firsthand how time flies, especially watching my own children grow from little ones to accomplished adults. Excited to share this journey with you all!

Let’s dive into some key lessons learned along the way:

- Embrace the power of compounding for long-term wealth growth 📈
- Prioritize financial goals and track progress diligently 📊
- Adapt to life’s changes with a flexible financial plan 🔄

Just like relationships, it is easy to look back on our finances and wonder ‘where did the time go’.



👍❤️

You and 29 others

2 reposts

*“Long-term care is awesome, baby!”* 📌



**Cindy Nagel, CFP®** • 1st  
Director of Business Consulting and Strategy at Fi...  
1mo • 🌐

What you can’t see in this picture... Ten years ago I was able to hear Dick Vitale speak. As a native Floridian and a big sports fan, Dickie V is one of my favorites. And of course, he was great (and yes he cried :)). What you can’t see in this picture is I attended this awards trip with a walker and a cane. I had a surgery go bad and had to have another surgeon fix the problem. It was a tough recovery and it was all I could do to get there. I won a special award and my husband had to help me up and down the steps to and from the stage. At the time, unrelated to that trip, we had just learned at one of our sales meetings from one of my favorite product partners that hybrid long term care could now be purchased over time rather than in a lump sum. My husband and I decided to purchase a 10-year pay. BUT I had to wait. One of the “knock-out” questions was had you used a walker or cane in the last certain period of time. I thought are you kidding me? I’m in my 40’s and I have to wait to purchase long-term care because I can’t yet qualify? So I waited. That was alarming to me. Ten+ short years later our policies are paid up - If you haven’t talked to your Financial Advisor about long-term care, you should! It’s a primary risk in retirement and there are so many ways to help protect your nest egg and your family. Oh, and I still love Dickie V 🏀 Long-term care is awesome, baby!



🌟

How can long-term care insurance protect your nest egg?

👍❤️

You and 42 others

13 comments • 1 repost

*“Friendly reminder to live in the moment and enjoy your surroundings... getaway before 2 weeks of work travel!”* 📌



**Adam Rean Bohlen, CSSCS** • 1st  
Director of Business Consulting - West Business C...  
2mo • 🌐

Friendly reminder to live in the moment and enjoy your surroundings. A short but beautiful getaway to Monterey, VA last weekend with [Danielle Lunsford](#) 's family before 2 weeks of work travel.



🌟

Tell me more about Adam Rean

👍❤️

Mark Stieve and 29 others

3 reposts

# #6

Not have a **STRATEGY** *(with post content)*



# Social Media Editorial Calendar

## June 2024

<b>MONTHLY OBSERVANCES:</b> National Homeowner's Month, National Annuity Awareness Month, Great Outdoors Month, African American Music Month, LGBTQ Pride Month						1
2	3	4 Diversified Wealth	5 World Environment Day  Retirement - IRC (Mar)	6 Higher Education	7 Feel Your Mind Friday	8
-----Healthcare Executives Appreciation Week-----						
9	10 Waterstone SS Seminar	11 Employee of the Month	12	13 Regional Meeting Follow up	14 Flag Day	15 Worldwide Day of Giving World Elder Abuse Awareness Day
		Baltimore Regional Meeting				
16 Father's Day	17	18	19 JUNETEENTH	20 First Day of Summer	21 Feel Your Mind Friday	22
23 Public Service Day	24	25	26	27	28 Insurance Awareness Day	29

### CONTENT KEY

	Events
	Blog Post or Lead Magnet
	Hashtag Days (#MotivationMonday #TipTuesday #ThrowbackThursday)
	National Observances (LPL Marketing Calendar)
	Holidays/ Seasonal Celebrations

## Create a strategic mix of post variety

- Events
- Educational Blog Posts or Lead Magnets
- Hashtag Days (leverage LPL Marketing Calendar)
- National Observances
- Holidays/Seasonal Celebrations

# Social Media Content Ideas

---

## LPL Content Marketing Calendar

- Leverage LPL's Marketing Content Calendar, for timely topic ideas for posts throughout the year.
- Available through LPL Resource Center or our Marketing Department
  - Monthly Client Outreach
    - Financial Wellness Month
    - Credit Education Month
    - Social Security Month
  - Hashtag Days: #MotivationMonday, #TipTuesday, #FridayFact



 LPL Financial

Email us: [marketing@lplatfrg.com](mailto:marketing@lplatfrg.com)

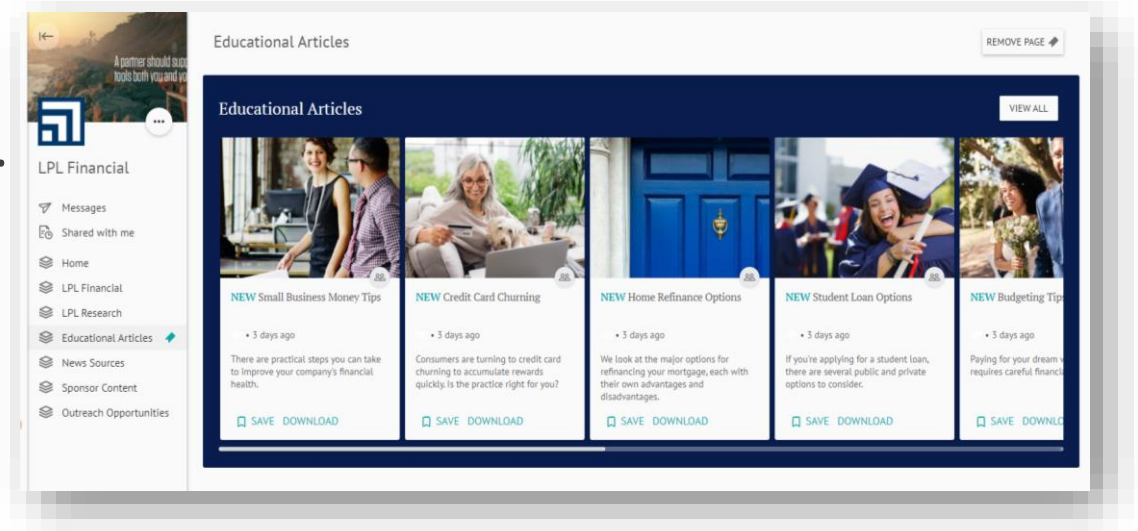
# #7

Not using CONTENT TOOLS

# LPL's Social Media Content Library

## Gainfully

- Available through Resource Center
- Automated – “Set it and forget it”
- Compliance-approved content
- Set to launch daily, monthly, quarterly, etc.
- LPL Research, Educational and Lifestyle articles, News, Financial Impacts, World Events, and other articles



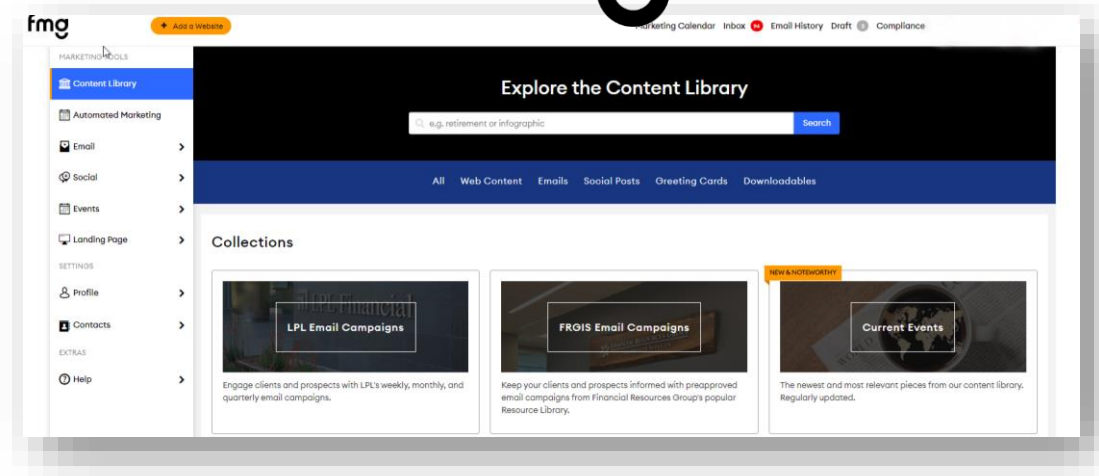
# FMG Marketing Suite

## FMG Marketing Suite: Partnership with Financial Resources Group

- Premier marketing automation system – all-in-one, integrated suite of tools designed for financial professionals.
- Automated – “Set it and forget it”
- Compliance-approved content
- Set to launch daily, weekly, or monthly
- Library of thousands of new articles and new content added regularly
- Downloadable metrics reporting – Opens, Clicks, Unsubscribes, Bounces



fmg



**Microsite:**

<https://micro.fmgsuite.com/frg/>



# #8

Not using VIDEO

# Video Popularity Among Advisors is **EXPLODING!**

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YouTube = MRR Review

Facebook & LinkedIn = Social Patrol



Under **Social Patrol**, load video directly to social media platform – *real-time surveillance!*



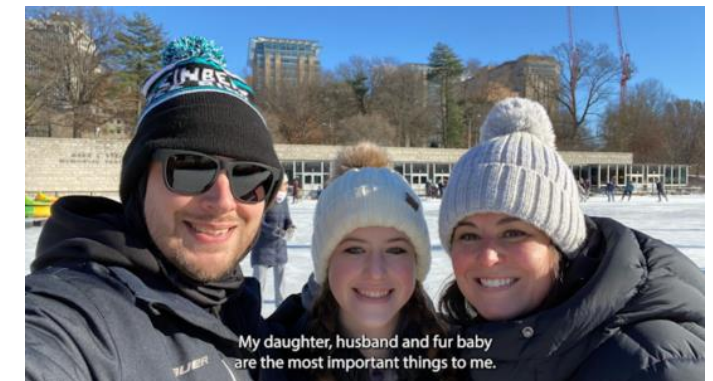
- 82% of Baby Boomers and Seniors are on YouTube - 60% daily.
- Almost 5 billion videos watched on YouTube every day

# 4 Ways **Video** Can Reinforce Marketing

1. **Boosts SEO** capabilities on social, website
2. **Improves Mobile Visibility** – *Keep videos brief for on-the-go consumers with short attention spans!*
3. **Increases Reach** – *Algorithms favor video content*
4. **Increases Social Proof & Credibility** – *Client testimonials, explainer videos and illustrative case studies reinforce your credibility*

Source: Smartasset Feb 2024  
[www.smartasset.com/advisor-resources/financial-advisor-video-marketing](https://www.smartasset.com/advisor-resources/financial-advisor-video-marketing)

SCAN: How  
Financial  
Advisors Can  
Use **VIDEO**  
to Grow 👉





*“Conversations from my Couch”*  
video series posted directly to  
**Facebook** and **LinkedIn** under  
SOCIAL PATROL capture.

#### Videos



Have a question for me? Drop it in the comments and I will answer a few...  
6 weeks ago · 59 views  
1



Social Security  
7 weeks ago · 54 views  
1



Long-Term Care chat  
11 weeks ago · 85 views  
3



Why doesn't my account performance match the index? #stockmarket  
15 weeks ago · 109 views  
5



Have you ever wanted to ask how to get started investing? #buildwealth...  
15 weeks ago · 96 views  
4



Where was Scott last week anyway??  
16 weeks ago · 158 views  
4










in Search













Home My Network Jobs Messaging Notificat



**Walter Woodrick, CFP** (He/Him) • 2nd  
CERTIFIED FINANCIAL PLANNER™ practitioner and founder of Woodrick Financial - making complicated financial issues understandable. I support clients (retirees, women, business owners) in working toward financial success.

 LPL Financial  
 Vanderbilt University

Walter Woodrick, Woodrick Financial, posts 2-min videos on topics such as current events, market news, financial planning topics, investment portfolios, or hurricanes and the unique and cool FLAMINGO 🦩 the hurricane brought!

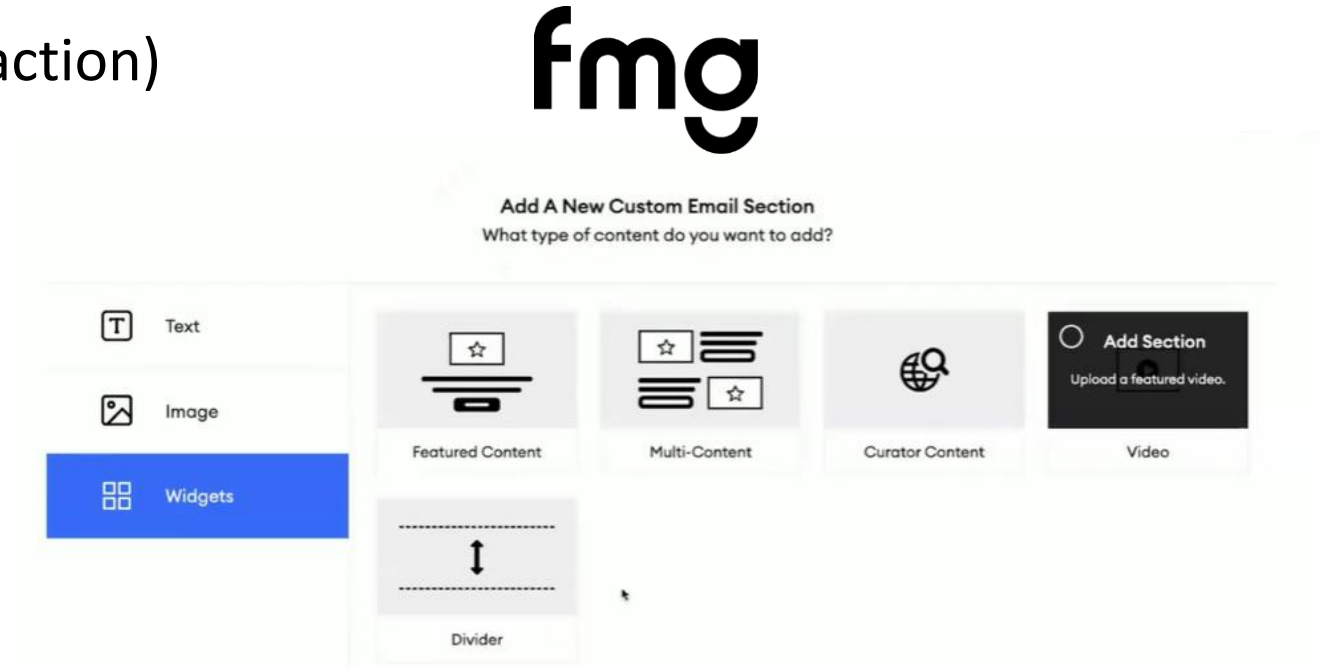
 <p>LPL Outlook for 2024 You can text certified financial...</p> <p>1</p>	 <p>The Christmas season... and your financial plans You ca...</p> <p>2</p>	 <p>Year, end planning: giving to charity from your IRA, tax...</p> <p>5</p>
 <p>Israel, interest rates, and risk. You can reach Walter...</p> <p>1</p>	 <p>Risk, life insurance, Medicare open enrollment. Text Walt...</p> <p>3</p>	 <p>Two minutes on government shut downs. Text Walter...</p> <p>3</p>
 <p>We can help you finally understand Medicare...</p> <p>3</p>	 <p>Always, always, always be sure you have named...</p> <p>4</p>	 <p>Flamingos... and your financial well-being??? Text...</p> <p>2</p>
 <p>Certified financial planners do not give shots! Text...</p>	 <p>What is a Roth IRA? Text Walter at (850) 724-1369</p>	 <p>Is the economy slowing? And what does that mean...</p>



# Video Use Cases

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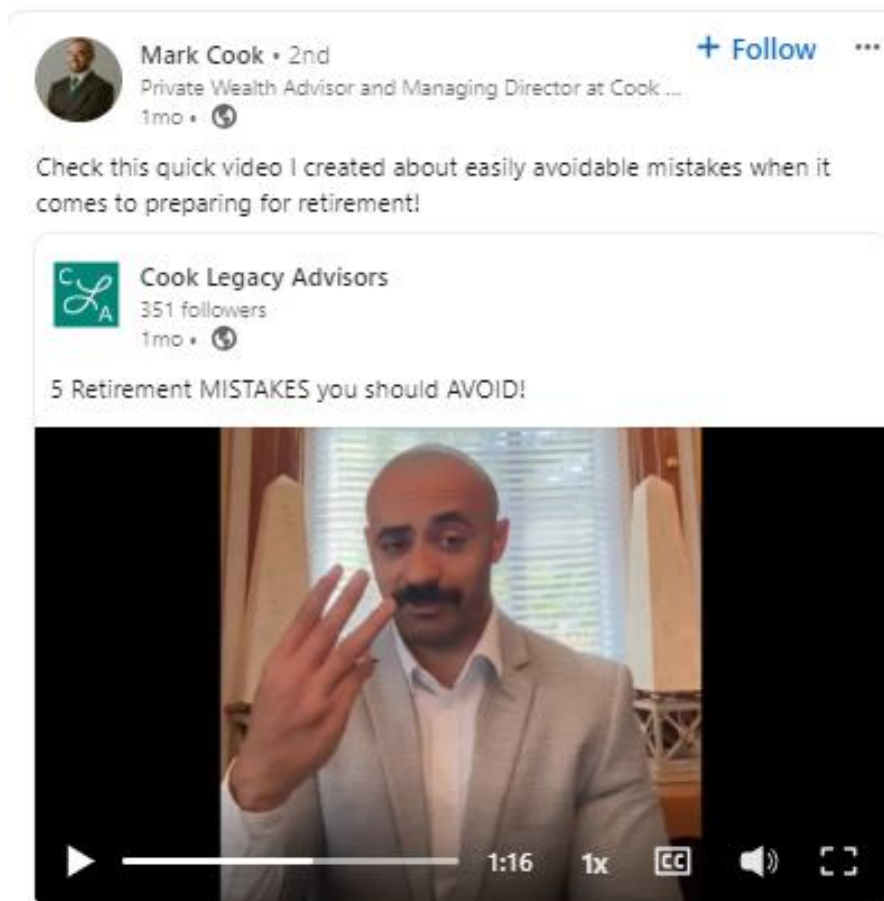
- Bio (background, approach, call to action)
- Pre-meeting intro call
- Gratitude video
- Success cases (reference niche)
- Client testimonials
- Blog summary (FMG Widget)
- Informative (Pre-approved scripts)



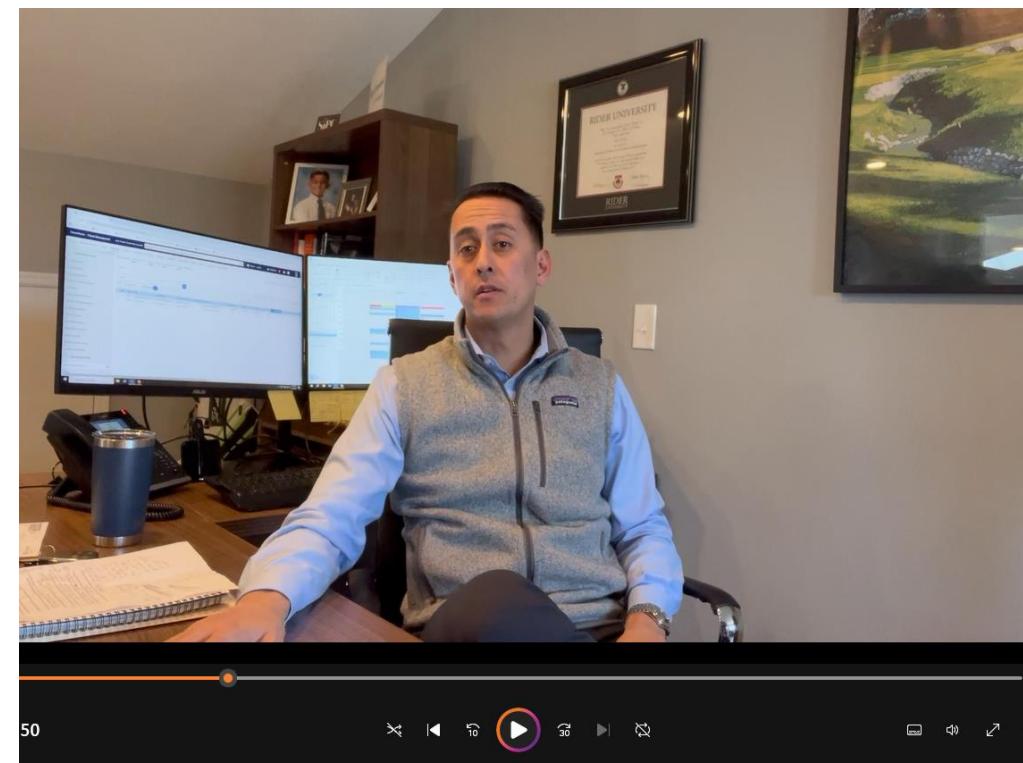
**Did you know?**

*FMG now has a widget for video!  
Video webinar coming in July!*

# Video Use Cases



**Mark Cook, Cooke Legacy Advisors**  
5 Retirement Mistakes to Avoid  
(pre-approved script from MOD)

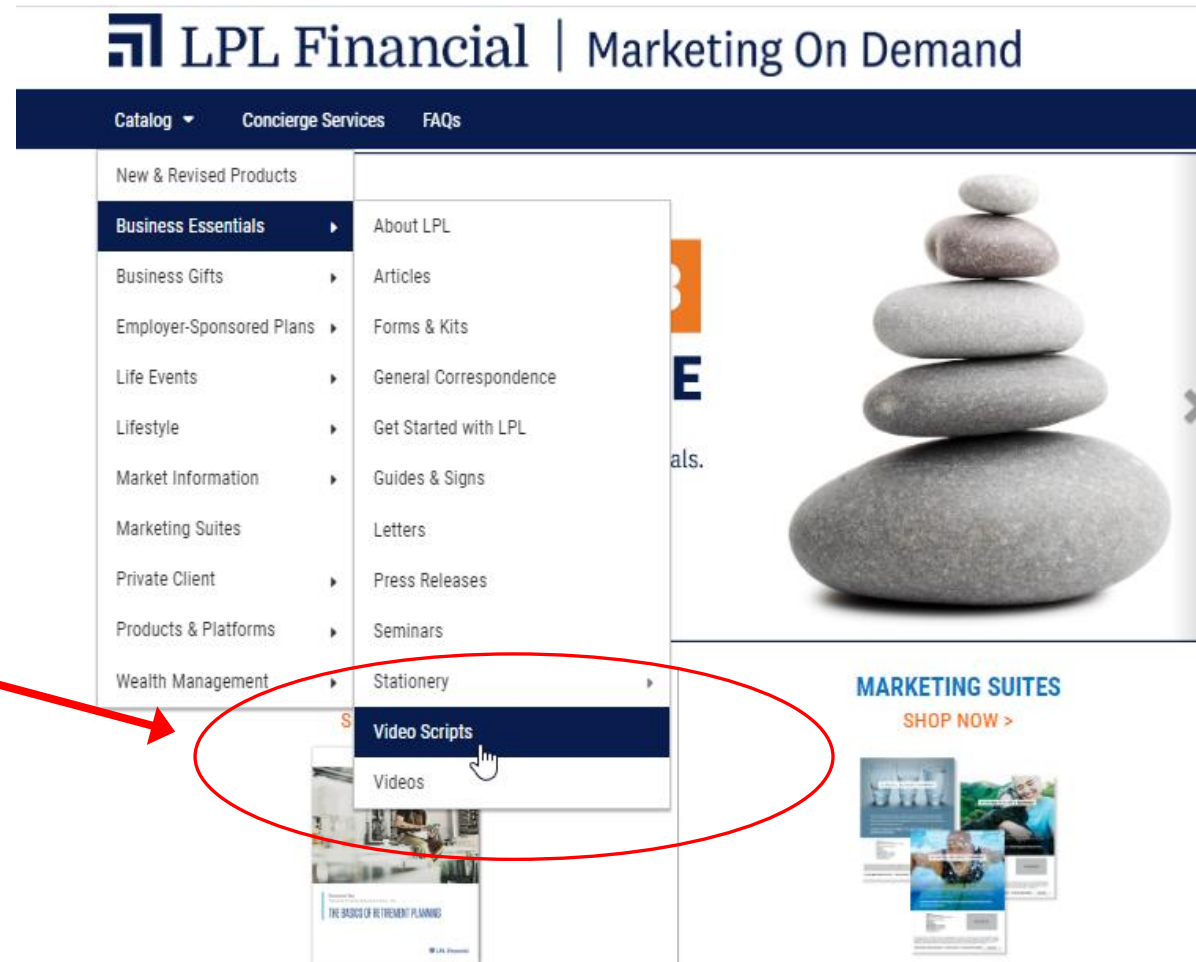


**Paul Ha, Cornerstone Wealth Partners**  
Success Case Video (explains how he helped client –  
mother of 4 who lost her husband and how he helped  
her work through multi complex issues)

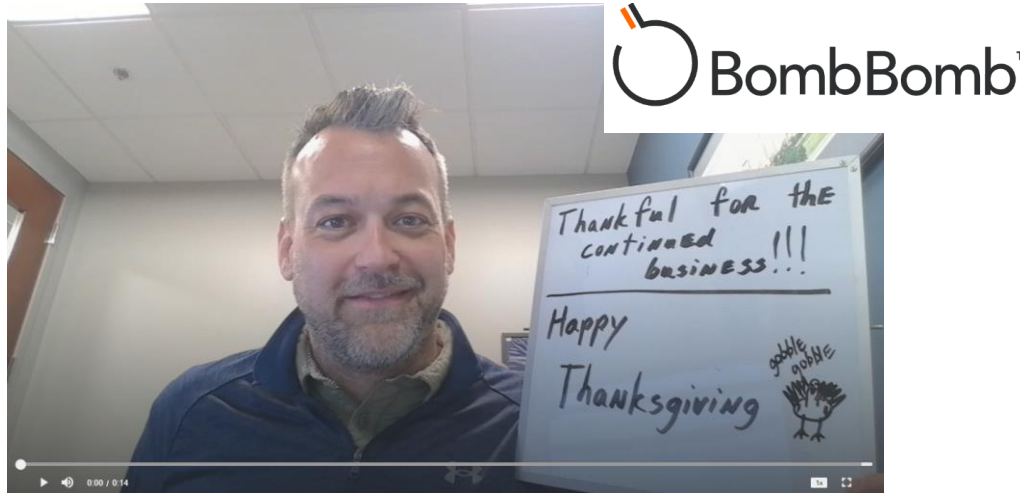
# Video Scripts – Marketing on Demand

Check out LPL pre-approved  
downloadable video scripts  
off Marketing on Demand

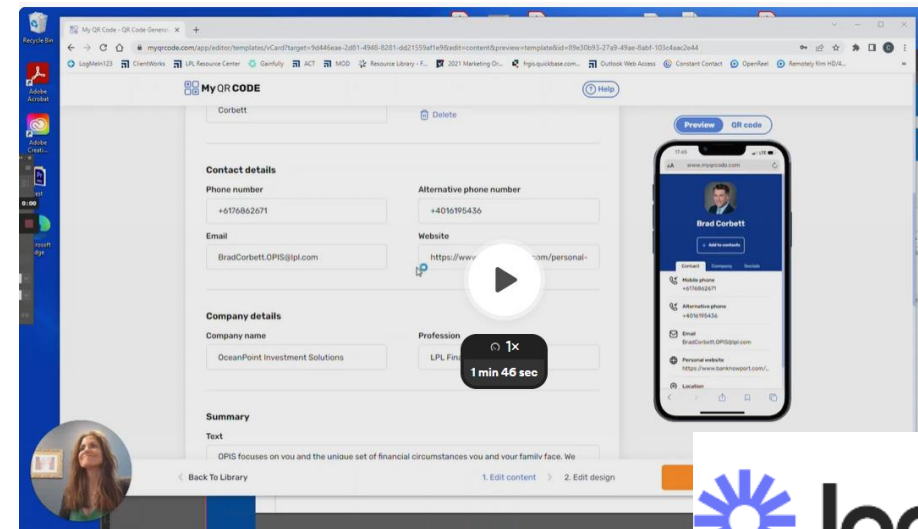
Navigation:  
Business Essentials >  
Video Scripts



# Getting Started with Video



**Tools for creating one-off videos  
(to dip your toes in the water):**  
Bomb-Bomb and Loom *(as long as video is  
sent via LPL email for journaling)*



# Getting Started with Video

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## Beginner Tips and Tools:

- Natural Lighting
- Framing
- Body Language
- Audio – Lav mic
- Ring light
- Tripod



### Video Kit:

- ✓ Ringlight
- ✓ Stand/Tripod with device holder
- ✓ Lav mic

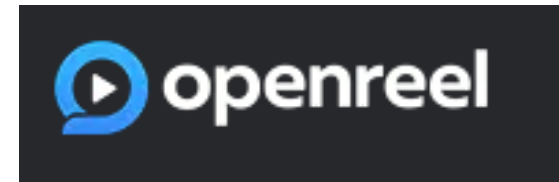


# Remote Capture Technology

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Open Reel uses remote capture technology to create powerful video content off a subject's phone

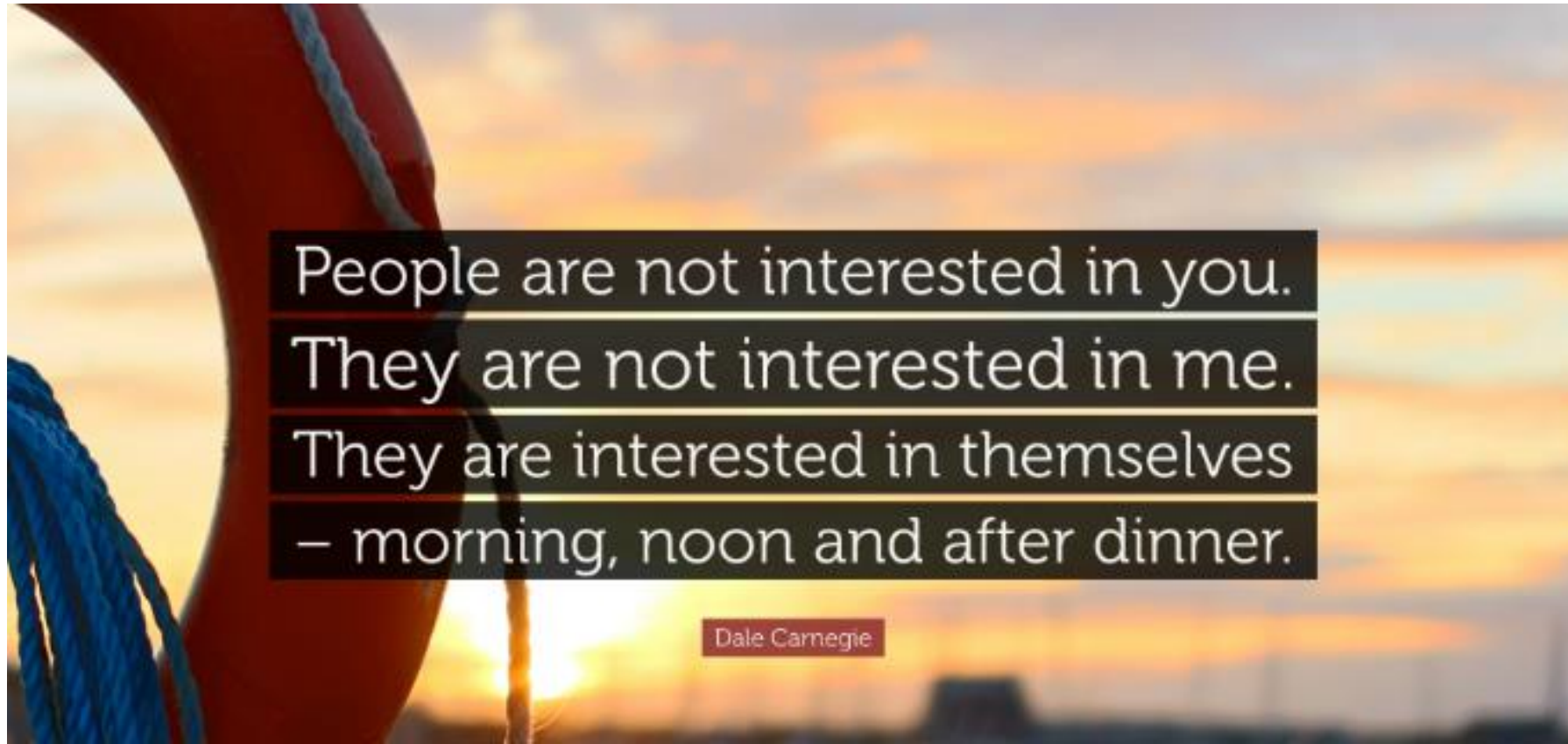


# #9

**Not using WIIFM Mindset**

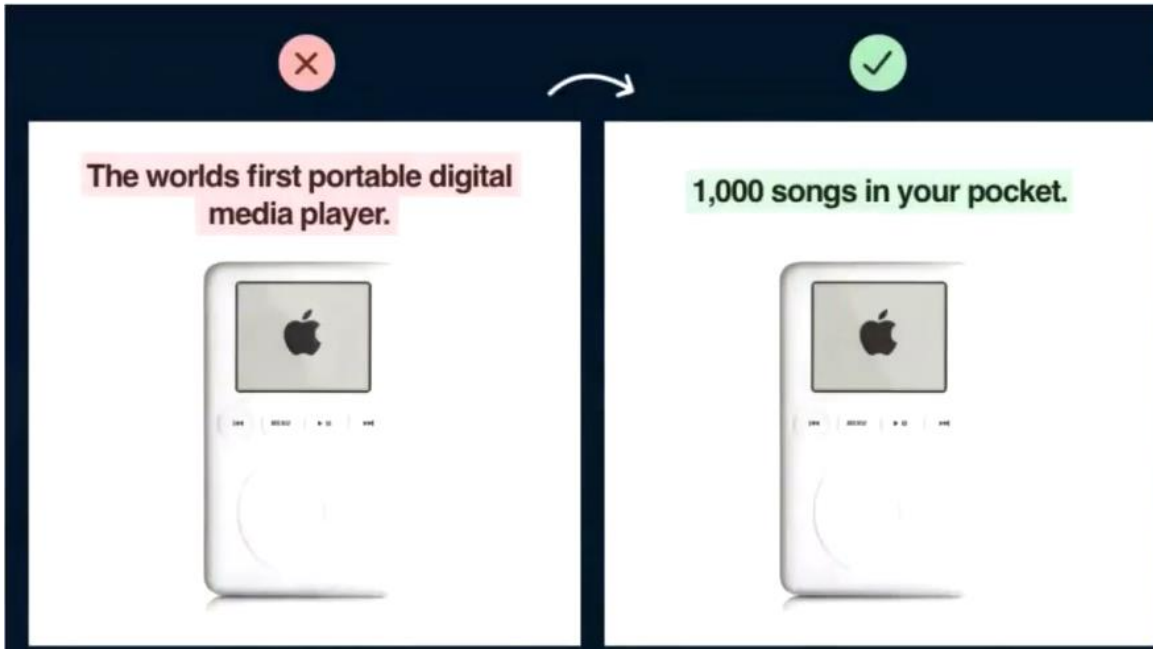
# What's in it for ME Mindset

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# What's in it for ME Mindset

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Apple's introduction of iPod:  
World's first portable digital player  
vs. 1,000 songs in your pocket!

The language we use matters.

Think about how to frame a social media post so **somebody should care**.

How can it benefit THEM?

# Social Media Tips & Trends

1. Custom button now on LinkedIn - website, book appointment...*every time you post something, the link will be there as well.*
2. Zero-click posting
3. Connect with groups on Facebook – *staying within compliance guidelines*
4. Content pie (editorial calendar - consistency)

**Want to learn more? Contact us!**

# THANK YOU!



**vCard – Marketing Dpt**



**“9 Mistakes” Deck**