

# THE LINKEDIN COURSE FOR FINANCIAL ADVISORS!

## Course Overview and Action Checklist

### Section 1: Welcome to The LinkedIn Course for Financial Advisors!

- ↓ Course Overview and Action Checklist (PDF)

### Section 2: What is LinkedIn and Why Do You Need It?

- ↓ Your LinkedIn Marketing Plan (PDF)

### Section 3: Getting Familiar With LinkedIn

- ↓ Anatomy of LinkedIn Cheat Sheet (PDF)
  - Spend 10-15 minutes browsing your LinkedIn dashboard

### Section 4: Getting Started on Your LinkedIn Profile

- ↓ How to Write a Great Headline with Examples (PDF)
  - Write your LinkedIn headline
- ↓ Six Steps to a Compelling Summary (PDF)
- ↓ Free Bonus: Summary Text Templates To Start From! (Word Doc)
  - Create your LinkedIn summary

### Section 5: How to Get a Great Headshot and Background Image

- ↓ Headshot Photo Tips (PDF)
  - Schedule your headshot appointment
  - Upload your headshot
- ↓ Free Downloadable Background Images (PNG Files)
  - Upload your new background image

### Section 6: Supercharging Your Profile

- ↓ Supercharging Your Profile Checklist! (PDF)
  - Complete all sections of your profile
  - Add multimedia content
  - Adjust your privacy settings

### Section 7: Compliance and LinkedIn

- ↓ Standard Disclosure Language (Word Doc)
  - Add FINRA.org and SIPC.org websites to profile
  - Add disclosures to experience section
  - Submit profile to compliance
  - Connect archiving software (Erado or Smarsh)

### Section 8: Connect With Your Existing Network

- ↓ How to Export Your Contacts and Upload to LinkedIn (PDF)
  - Connect with your network on LinkedIn
  - Request to join 50 LinkedIn Groups
  - Add your LinkedIn profile to your website, email signature, etc.

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### Section 9: Prospecting on LinkedIn

- ↓ Sample Follow up Message (Word Doc)
- ↓ Sample Referral Partner Introduction Message (Word Doc)
- ↓ Worksheet: Identifying Your Qualified Prospects (PDF)
  - ☐ Complete worksheet to identify your qualified prospects
  - ☐ Create saved search for qualified prospects
  - ☐ Set goal of sending 100 connection requests per week
  - ☐ Commit to sending follow up message to all new connections (approx. 25)
  - ☐ Set calendar time to follow up to messages (Tuesday and Thursday)

### Section 10: Creating Your LinkedIn Marketing Campaign

- ↓ Example Campaign Funnel Worksheet (PDF)
  - ☐ Design your first LinkedIn campaign
- ↓ Step-by-Step Instructions: Creating Your LinkedIn Ad (PDF)
  - ☐ Create your first LinkedIn ad

### Tying it All Together

- ☐ Track Your Success
- ☐ Ask Questions
- ☐ Get Support

### Taking the Next Steps

- Read The LinkedIn Guide for Financial Advisors Book (on Amazon now)
- Join my newsletter to get marketing tips ([indigomarketingagency.com/newsletter](https://indigomarketingagency.com/newsletter))
- Send me your feedback on this course by emailing [claire@indigomarketingagency.com](mailto:claire@indigomarketingagency.com)
- Sign up now and save 20% on Your Next Marketing Course! (Coupon Code INDIGO20)