

# The LinkedIn Course for Financial Advisors

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## How to Use LinkedIn to Get Qualified New Clients



# **Welcome to The LinkedIn Course for Financial Advisors!**



# About me

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Former Investment Advisor Representative with LPL Financial

My Dad has been an advisor for 37 years

I worked with FMG Suite before starting Indigo Marketing Agency

I have worked with hundreds of top independent advisors

Currently work with several of Barron's top independent advisors using this exact strategy

MBA in Marketing from the Rady School of Management at UC San Diego

BA in Economics from UC Davis



# Why I Work With Advisors

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I know that you do important work

Marketing is more challenging than ever

What worked in the past doesn't work anymore

I want to help you help more clients

It's my goal to simplify the complexity of marketing

There ARE marketing strategies that work without breaking the bank!

## What We'll Accomplish in This Course

- Everything you need to know to be an expert
- Real life examples from top advisors
- Step-by-step guidance to implement your LinkedIn Marketing Plan
- All the resources you need to make things easy



# You will succeed!

This plan has worked for over 100 top advisors.  
The strategies work no matter your niche, firm size, or style.  
This course includes all of the information you'll need.  
Follow the steps and I guarantee you will succeed!

## Course Overview

1. What is LinkedIn and Why Do You Need It?
2. Getting Familiar With LinkedIn
3. Getting Started on Your LinkedIn Profile
4. How to Get a Great Headshot and Background Image
5. Supercharging Your Profile
6. Compliance and LinkedIn
7. Connect With Your Existing Network
8. Grow Your Network
9. Create Your LinkedIn Marketing Campaign that Converts
10. Putting it All Together & Taking the Next Steps

## Navigating this Course

There are Ten Sections

Each Includes a Video

All Slides are Available for Download

Supporting Resources Include:

- Examples
- Checklists
- Worksheets
- Templates
- Tips & Tricks

# How to Use This Course

Skip sections or  
videos you don't  
need



The beginning of  
the course is for  
beginners



The most important  
info is at the end of  
the course





# How Long Will This Course Take?

Try to invest **one** hour per day!

## If You Get Stuck

1. Ask a question by emailing [claire@indigomarketingagency.com](mailto:claire@indigomarketingagency.com)
2. Download the slides for review
3. Download the course resources and follow along

**If You Finish this Course  
and Implement These Tools  
You Will Change Your  
Business Forever**



# Let's Get Started!