

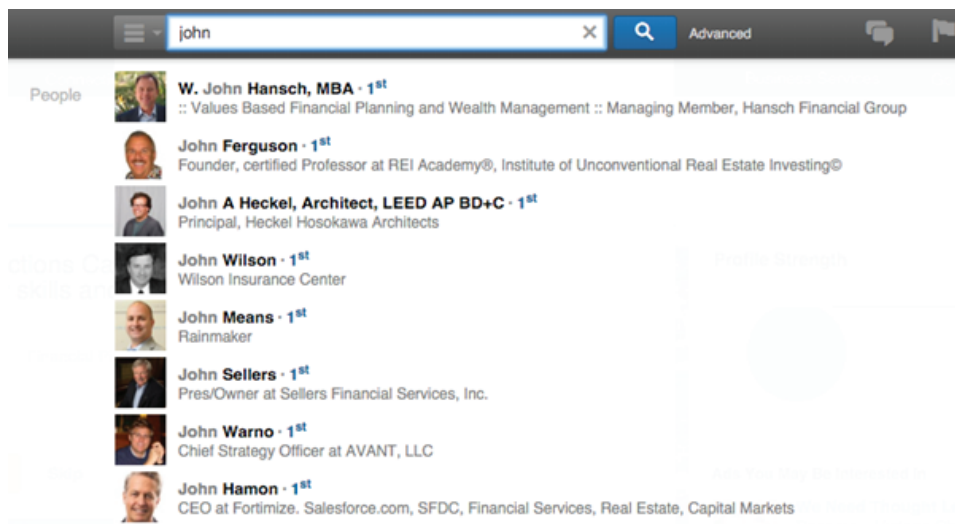
THE LINKEDIN COURSE FOR FINANCIAL ADVISORS

How to Write a Great Headline with Examples

LinkedIn Headlines are 120 character “hooks” that appear right under your name on your profile and in search results. Similar to a newspaper or magazine headline, it should be catchy, interesting, and easy to read. Your headline is your opportunity to capture interest and invite users to learn more about you.

Many LinkedIn experts will tell you that your headline is the most important part of your profile, and this may be true for job seekers. However, for financial advisors, I disagree. I find that a profile summary section that resonates with prospects is more impactful than a great headline. Since advisors depend much more heavily on referrals, most keyword searches will be for the advisor’s name or firm name.

You may not realize that headlines show up with your name during an active search, meaning as I am typing into the LinkedIn search bar, profiles and their corresponding headlines appear under my search. Because your entire headline appears during a search, it has an impact on whether people choose to click on your profile and learn more about you.



Awful Headlines

Despite their importance, most LinkedIn headlines are abysmal. The majority of LinkedIn users do not understand what a headline should be or its impact. Most people list their job title or company and fail to take advantage of all 120 characters.

Marketing in general should always focus on how you can benefit prospects. Unfortunately, people do not care about what you do, they care about how you may be able to help them. Some of the worst headlines I see highlight what an advisor does, how he thinks he is great, how he views himself, but nothing regarding the benefit he could offer prospects.

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Just for fun, let's take a look at some real life terrible headlines:

"I love selling life insurance!" What does this have to do with me, the prospective buyer? Just because you love doing something doesn't make you good at it. Who do you sell life insurance to? What types do you specialize in? How are you different than every other life insurance salesperson?

"Rainmaker" For who? In which industry? What are you selling? If I am a prospective buyer, I may be put on the defensive by the headline, as I'm not sure I want you rainmaking with my money.

"President at Jones, Inc." While this may be your title and company, it tells me nothing about who you serve, what your firm does, what you do, or how I can benefit. Unfortunately, this is the most common headline I see for advisors.

"Author, Speaker, Life Coach & Veterinary Pharmaceutical Sales" This may be my favorite. I'm sorry, but you cannot possibly be the best of the best at each of these endeavors. Too many titles and keywords can be confusing to prospects. For your headline, choose your "main thing" and focus on it.

"Lead Generation - Roofing Contractors Contractor Marketing Author of Best-Selling 80/20 Internet Lead Generation " Please do not use symbols or emoticons. They come across as childish, cluttered, and unprofessional. Write your headline as a headline, which is a string of words that form a cohesive thought, not a hodgepodge of separate ideas and symbols.

"Unix SME / IA SME / IAM at SPAWAR SSC PAC" This is an actual headline for a government contractor in my network. His experience section reads only the following: "TSw IA Lead, IAO for 5 TSw systems, TSw OCRS Coordinator, Unix SME, IAM for Piers renovation." While his peers might understand what that means, it's best practice to translate your LinkedIn profile into language that a layperson can understand. For advisors, this means being careful about your designations and acronyms.

How to Write a Great Headline

Headlines should give three important pieces of information as clearly as possible:

1. What You Do
2. Who You Do it For
3. How it Benefits Them

Of course, it is challenging to sum up your value in 120 characters. The more specialized and clear you can be, the better your ideal prospects will be able to find you. As you use LinkedIn regularly, you'll find yourself updating your headline periodically when you get a better idea or come up with a more elegant way of phrasing your value.

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Essentially, you should try to convey the value you offer to your specific clients.

Remember that headlines are searchable by keyword, so you'll want to spend some time thinking about what your prospects might type into a search when trying to find an advisor to help them with their particular plight. Terms like "Wealth Manager," "Financial Advisor," "Estate Planner" are more powerful than "Founder," "Managing Partner," or "CEO" from a keyword search perspective.

Which Keywords Do Prospects Use to Search?

To better understand which keywords prospects may be searching for to locate your firm, you may want to take a look at your website's Google Analytics, which allows you to see the traffic to your website and where it came from.

Within Google Analytics, you can see which keywords folks are searching for to find your website, and incorporate them into your headline and profile. These keywords are different for every business. Here are some real life keyword search terms for some of the advisors I work with:

- Financial Advisor Glastonbury CT
- Thomas Dobransky LPL
- Financial Help Toledo
- Investment Planning for Women
- Charitable Remainder Trust Advisor
- Business Planning for Anesthesiologist

Should Job Title be Included?

Often, advisors ask me whether they should list their job title and firm name in their headline. Keep in mind that both your job title and your firm name will be listed in your "Experience" section, so there is no need to list them again in your headline, unless you have good reason to from an SEO perspective.

If you work for a very large firm with high name recognition, I would use the firm name in your headline, such as Wealth Advisor at Carson Wealth Management Group.

If your firm name has your own name in it, I would leave it out since that keyword is already accounted for in your name. If your firm name clearly states what you do and who you do it for, I would include the name, such as Financial Advisor with Engaging Women in Wealth Financial Group.

The bottom line is that if you have reason to believe prospects are searching for your business name and it is different from your actual name, include it in your headline. Likewise, if you have professional designations, add them to your name or headline, as some prospects include "CFP" or "CFA" in their search terms.

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Effective Headlines

The trick to writing a good headline is to balance the use of keywords for search engines and also write a headline that resonates with humans looking to learn more about how you can help them.

I know from Google Analytics that keyword searches for my own business website typically include "Claire Akin," "Indigo Marketing Agency", and "marketing consultant for financial advisors." I wrote my headline as "Marketing Consultant Helping Independent Financial Advisors Grow Assets Under Management at Indigo Marketing Agency." It is relevant-keyword-rich and explains exactly what I do, who I do it for, and how I help my clients.

Here are some examples of effective headlines for advisors:

- Fee-only Financial Advisor Serving Widows and Divorcees at Haven Financial Solutions, Inc.
- Wealth Manager Serving Individuals and Biotech Businesses in San Diego, California
- Pension Consultant Specializing in Custom 401(k) and Defined Benefit Plan Design
- CERTIFIED FINANCIAL PLANNER™ for Entrepreneurial & Professional Women in Southern California
- Chartered Retirement Planning Counselor Providing Alternative Investment Advice to Accredited Investors
- Experienced Investment Advisor Offering Institutional Cash Management for School Districts in Texas

Here are some examples of great headlines for advisors, since they include what you do, how you serve, but also the benefits you offer:

- Fee-only Financial Advisor Helping Business Owners Pursue True Wealth
- Fiduciary Wealth Manager Helping Physicians Catch Up for Retirement in a Hurry
- Retirement Advisor Helping Intel Employees Secure Income for Life

Try out some options for your own headline now, including what you do, who you serve, and how you help:

1.

2.

3.