

MARKETING

BY MARIE SWIFT

How to create a more powerful and engaging advisor profile

Many advisors struggle to create a powerful and engaging profile on find-a-planner directories—and even on their own website and social media accounts. But having a really good profile is vital. Many prospective clients will not click through to inquire about your services (and may even discount you entirely) unless a few important things come into view quickly. What can NAPFA members do to improve their profile pages and generate more inquiries?

Think “central hub and satellites”

Focus first on the profile on your website. Think of your website as your online hub, and work to drive traffic to a special offer or call to action. It is essential that you clearly communicate your value, what you do and why, as well as who you serve. Other advisor profiles, such as your NAPFA member profile and social media profiles, serve as satellite entities. Imagine them orbiting around your hub and, ideally, linking to it. Satellite entities boost your search engine results and provide prospects with more opportunities to discover you. Having a nice array of digital assets adds to your credibility as well. In fact, that’s exactly how your satellite profiles should be viewed: as digital assets.

Allan Slider, founder of find-a-planner directories FeeOnlyNetwork.com and WhyFiduciary.com, notes that neglecting your profile pages can

tarnish what might otherwise be a good perception. “Make sure you’ve got enough accurate and engaging information on your profile pages to reinforce your reputation and build your credibility, and eventually get people to visit your website and reach out to you. Don’t just give your profiles a cursory glance—really dig in and make them as comprehensive and compelling as possible,” he says.

Khalid Usmani, chief operating officer at GuideVine.com, a platform that connects consumers to registered investment advisors, notes that before a prospective client makes a decision, they check out advisors in multiple places online—not only going to the advisor’s website, but also taking a look at social media profiles and any other digital touchpoints they can find. “I strongly believe in having a strong digital footprint, because people will look at information in different places, but they may contact you in a different way,” he says.

Be consistent across profiles

To create a sense of connectivity and trust, make sure all your profiles are consistent across platforms. They should have the same look and feel—preferably reflecting what people see when they visit your website. Not only does this help the cohesiveness of your brand, but it also reinforces the points you’re trying to drive home. Google your name and your firm’s name regularly. Make sure you are aware of all

your profiles—you might be surprised to find some services, such as Wealthminder and Brightscope, set them up without asking your permission. Do what you can to ensure they are all updated and in sync.

Having a high-quality professional headshot helps prospects see the caliber of person you are. Make sure your photo is properly optimized so it loads quickly. With people’s short attention spans and a plethora of competition online, a picture that loads slowly could be enough to turn a consumer away. If you are sizing your own photos, you can use Kraken.io or TinyPng.com.

Create interactive content

“Your website and profile on your website should be as interactive as possible to keep people engaged,” says Michael Solari of Solari Financial Planning. “People are constantly coming in and out of your webpage—most people aren’t spending a ton of time on it—so you want to make sure that you engage them with compelling photos, videos, social media feeds, and other interactive features.”

This interactive content—especially video content—should be featured whenever possible on your satellite profiles as well.

“Video is a great way to quickly give someone a personal snippet about you and your firm,” says Guidevine’s Usmani. “When a prospect is considering an advisor, part of it is they’re making sure the advisor has the capabilities,

experience, credentials, etc.—but they are also looking for a right fit. Personality and trust come into play, and it's hard for that to come across in a static profile. Video can showcase a bit of your personality; it certainly doesn't replace an in-person meeting, but it does give people a taste of how this advisor would interact with them and if they would feel comfortable with that advisor." Usmani recommends using the same video on all of your profiles, the same way you would use your bio or headshot, in order to provide value and consistency at the same time.

Keep it fresh

"Build your profile, but also make sure you spend plenty of time generating content—blogging, writing articles, creating videos, etc.—because people who are searching for you by specialty or niche will have an easier time finding you that way," says Dylan Ross, director of communications & financial planning at the Garrett Planning Network.

Although building comprehensive, engaging, and consistent profiles across all of your platforms is important, that's just the first stage. Continue to update all of your profiles with fresh content.

If you are quoted in the media, you should highlight that on your profiles. List the publications in which you were featured and link to them. This will help you increase credibility and will make people a little bit more comfortable. You also want to have different calls to action—contact links, schedule-now buttons, free white papers, subscriptions, etc.—so that you can capture some information about prospects and then include them in your email marketing campaign or contact them in the future.

"One thing that works really well is cross-promoting your content from your website between different profiles and sites. Putting it on LinkedIn and sharing across other social networks, including it on your planner profiles—those are great ways to get more eyeballs on your content, which will ul-

timately lead them back to your central hub," Ross adds.

Whenever you create valuable content, don't be afraid to share it across all of your social media profiles and link to it from your advisor profiles, which will drive traffic back to your website (especially if the content is hosted on your website). Focus on leading people to an information capture form so you can keep in touch and build trust. It may take a while for an interested consumer to become a prospect and, ultimately, a client.

Work hard to stand out

"We hear from consumers all the time; it's very hard for them to figure out the differences between advisors," says Usmani. "Many advisors when they talk about themselves will say, 'I'm a Fee-Only, holistic financial advisor.' So, finding ways that you can differentiate yourself in terms of what you do is important."


Sometimes it's your personal story or passion that really resonates with the right people. If you specialize in working with a specific niche or group of people, communicate that on your profiles as a way to help set you apart from the competition. When you market yourself as serving those types of clients, prospects from that group are more likely to work with you because they think that you are more likely to understand their concerns.

Bulleted specialty sections on profiles are very useful, but when it comes to these bulleted sections, less is more. First, ensure that no specialties contradict each other. Also, don't list generic bullets that every advisor uses; focus instead on where you want to make the most connections, and use targeted words that appeal to those people. There's no need to list "CFP" or "Fee-Only fiduciary," and there's no need to explain what those things mean in your profile, either. Far more important than talking about the advantages of working with a CFP or a Fee-Only financial

planner is talking about who you are, who you serve, why you got into the business, your mission, and what sets you apart.

"Consumers want to see in your profile not just who you are from a business standpoint and who you work with, but also some of the personal stuff," says Garrett Planning Network's Ross. "I've heard advisors say, 'I don't want to put that in my profile because it's irrelevant'—things like where you went to school or what you do in your free time—but these are things that people connect with, and if they feel like they know you a little bit better, it might make the difference between somebody deciding to work with you or another advisor."

If you make it clear on your profiles who you serve and why, and help consumers immediately realize if they will be a good fit for you, you'll save everyone some time. "While for some it may be great to get 100 leads, if you're running a small firm, as I am, you only want to follow through with the ones that are going to be the best fit," says Danna Jacobs, founding partner of Legacy Care Wealth. "So, by changing your message to specifically target your niche—who you think you can impact the most and are best aligned with—you're going to not be wasting anyone's time and you'll have more of an impact on the people that you absolutely want to reach."

To view the webinar on which this article is based, click on "How to Create a More Powerful and Engaging Advisor Profile" in the NAPFA Store. Access to the recording is free to members. 

Longtime marketing communications professional Marie Swift and her team at Impact Communications, Inc. have for over 20 years worked exclusively with fiduciary advisors and allied institutions. Find more insights at www.MarieSwift.com.