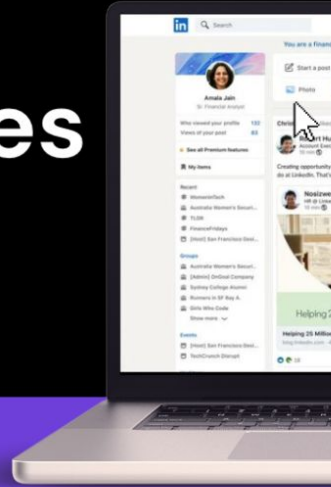




The 7 Biggest Social Media Mistakes That Advisors Make

Learn how Samantha grew to
37,000 followers in a few years.





Samantha Russell

Chief Evangelist, FMG

 @SamanthaTwenty

 /samanthacrussell

 srussell@fmgsuite.com

An award-winning marketing suite.

Built just for you.

2024



#1 in Digital Marketing

T3 Advisor Software Survey 2024



Best Overall FinTech Software

FinTech Breakthrough Awards 2024



Practice Management Solutions Provider of the Year

Wealth Solutions Report 2024



2022 & 2023



Best Marketing Automation

WealthManagement Industry Awards 2022



Executive Leadership Award For Fintech Platforms

ThinkAdvisor Luminaries 2023



Top in Customer Satisfaction

MarTech Breakthrough Award 2019-2022



Our expertise is showing off yours.


#1

You don't follow the 80-20 Rule

Follow the 80/20 Rule 🙌 🙌


For every **1** thing you post to your own feed,
Comment on at least **5** other people's posts

**Secret Tip: “Prime” the algorithm
by leaving comments FIRST thing in
the morning, BEFORE your post
goes up.**



Helpful information is a
like a 




It draws people to  you

Marianna's Post


3d · 

Coming to lake como with my family in June. Which town is best to stay?
Restaurant recommendations?
Private boat tours?
Anyone know of day trips to Switzerland ? ... [See more](#)


 2  9 comments


 Like  Comment  Share


[All comments](#) ▼

 **Paolo Polledri** Top Contributor

Hi Marianna if you want to go to Switzerland for a tour I suggest you the Bernina express train.It start from Tirano and arrive to St. Moritz crossing beautiful valleys and mountains .You can reach it by train from Lake Como east coast. There is a good train connection that run from Lecco (south lake Como) to Tirano where you have to change the train.. The train line stop in every east coast town. In June the best place is Varenna but actually I think is very difficult to find an accomodation maybe is too late. Others good town to stay are Bellano,Dervio then the last in the north Colico. My suggest is check the hotels availability starting from Varenna going up to Bellano, Dervio and Colico. About boat tour please look at our website or message me directly on whatsapp. For any question about our lake feel free to write here.

 [TRENODISAILING.COM](https://www.trenodisailing.com)
Tre Nodi

3d Like Reply Share Edited 

 **Mary Clarke**
Sharon Bandos see these cities recommended for staying?

#2

You are Boring



Joshua Brown · 2nd

CEO at Ritholtz Wealth Management

2h · 🌐

Connect

"This post got almost zero engagement because it was obviously self-promotional, contained no interesting information and included a poorly cropped image of something nobody cares about. Maybe if I do a hundred more posts like it, something different will happen."

- the people in your timeline



Colin Meeks and 122 others

12 comments · 2 reposts



Like



Comment



Repost



Send



Add a comment...



Most relevant ▾




Joshua Brown **Author**

1h ...

CEO at Ritholtz Wealth Management

Here's a post where I add 200 people's names and tag them all. They've never shown any indication that they enjoy this, I'll just keep doing it anyway.

Humor goes a long way.



 **Max Pashman, CFP®**  · 1st
Financial planning & education (without the jargon)
[Book an appointment](#)
4h · 🌐

When it's April 2nd, but the fact that only 18% of people are using a high-yield savings account is still a joke. ...see more




   Will Goodson, CFP® and 45 others 38 comments




 **Mando Sallavanti III, CFP®** · 2nd [+ Follow](#) 
Gen Z's Financial Planner | Transforming Your Mone...
4h · 🌐



What if I told you that you could have no taxes in retirement?

 **@Mando Sallavanti III**
Manage money efficiently

This isn't a pipedream.

It's a Roth IRA.



  Alex Koynoff and 67 others 63 comments · 1 repost

Incorporate current events – what is everyone already talking about?

Source: This visual available in the FMG Social Content Library 👉



Chris DeWolfe · 2nd
Managing Partner at Investment Consulting G...
[Book an appointment](#)
2w · 🌐

Are election years typically good years for the stock market?

For those who are curious, here's some interesting historical ...see more

S&P 500 Annual Stock Market Returns During Election Years

2000	-9.1%	Bush vs. Gore
2004	10.9%	Bush vs. Kerry
2008	-37.0%	Obama vs. McCain
2012	16.0%	Obama vs. Romney
2016	12.0%	Trump vs. Clinton
2020	18.4%	Biden vs. Trump

Stocks are measured by the Standard & Poor's 500 Composite Index, which is an unmanaged index considered to be representative of the overall U.S. stock market. Index performance is not indicative of the past performance of a particular investment. Individuals cannot invest directly in an index. The returns and principal values of stock prices will fluctuate as market conditions change. Shares, when sold, may be worth more or less than their original cost.

👍👎 3 2 comments

👍 Like 💬 Comment 🔄 Repost ➦ Send

Add a comment... 😊 📷

Most relevant ▾

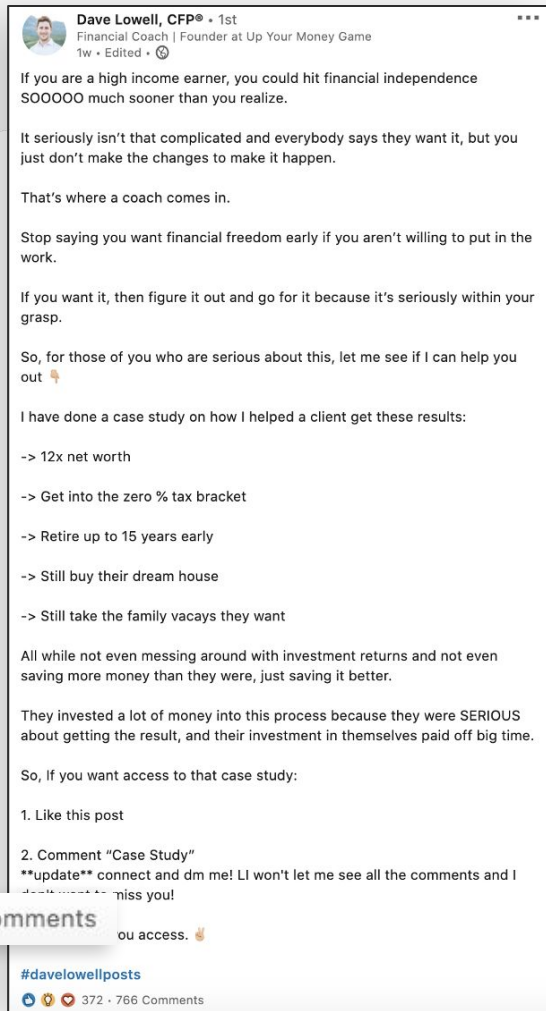
Frank Schiller · 3rd+ 2w ...
First Director at Public Interests Research and Communicatio...

Great insights here on the US presidential election cycle and market trends. Valuable perspective on historical patterns and economic fundamentals over long-term investment strategies. Thanks for sharing!

Financial Services
Content is often
BORING 🙄

BUT it doesn't have
to be.

This post got 766
comments



Dave Lowell, CFP® · 1st
Financial Coach | Founder at Up Your Money Game
1w · Edited · 🌐

If you are a high income earner, you could hit financial independence SOOOO 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 vacations 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!

ou access. 🙌

#davelowellposts

👍👎🔥 372 · 766 Comments

What will be
**HELPFUL &
INTERESTING** for
your audience to
know or learn
about?

What will people
leave comments on
or reshare?

**Family-Friendly Events in
Columbus this weekend!**
(Including Lots of Easter Egg Hunts!)

- 1. Eggs, Paws & Claws at Columbus Zoo and Aquarium**
- 2. 60th Birthday Celebration at COSI**
- 3. Clintonville's Easter Egg Hunt**
- 4. Bunny Hunt Trail at Blendon Woods Metro Park**
- 5. Easter Egg Hunt & Puppet Show at Advent Lutheran Church**

Click the link for the complete list of 40 events!

nittanyannies

*Date Night Ideas
March 22-24*

Marshmallow Overcoat
Wpsu Penn State- Friday @ 3:00

Jeff Dunham
Bryce Jordan Center Friday at 7:00pm

Penn State Woman's Lacrosse Game
Panzer Stadium Friday @ 8:00pm

Penn State Men's Baseball Game
Medler Field Saturday @ 2:00pm

Romeo Et Juliette
Friedman Auditorium Sat-12:55 pm

Brunch at Gigis Southern Table
Sat & Sun 11:00am-2:00 pm

Yoga at the Hollow with live music
Titan Hollow-Sunday 10:00-11:00am

Spring Brushes and Blooms- Watercolor
Workshop
University Wine Co Sunday 2:00-4:00
*preregister

#3

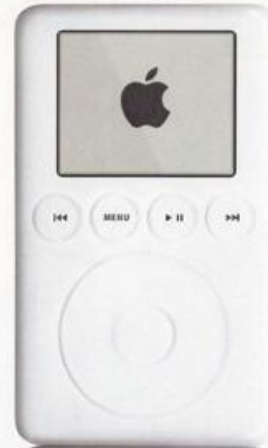
You don't use the WIIFM Mindset



The worlds first portable digital media player.



1,000 songs in your pocket.



Attention-grabbing
headline
+
Good Visual

Jeff Hurst, CPA · 2nd
President at Hurst Financial Consulting LLC

Do you think your tax rate will be higher in the future?

Look at this chart by YCharts showing the historical tax rates for the lowest and highest tax brackets.

For the highest bracket, the historical average (not the high) is 57.69%, although we are currently at 37%.

Some believe that taxes may increase in the future. Here are the facts:

- Higher tax rates may be part of any proposed solution to the current U.S. deficit.
- The time to manage your taxes is when you understand the current rates.

Every person's situation is unique, but as we approach year-end, a Roth IRA conversion for a portion of your retirement portfolio may be a strategy to explore a bit more.

A Roth IRA must meet a 5-year holding rule and occur after age 59 ½ for the tax-free and penalty-free withdrawal of earnings. Tax-free and penalty-free withdrawals can also be taken under certain circumstances, such as the owner's death. The original Roth IRA owner is not required to take minimum annual withdrawals.

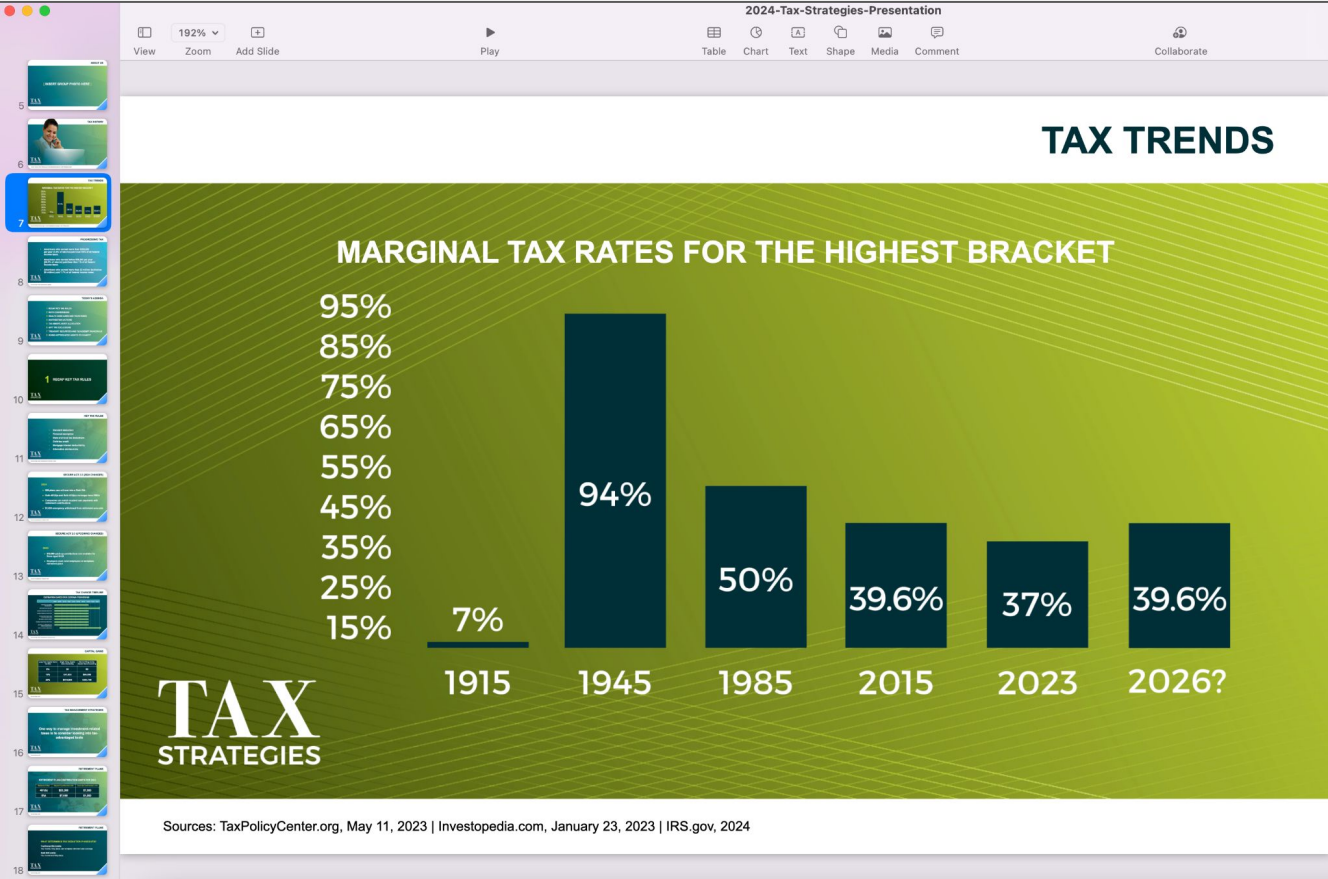
This post is for informational purposes only and is not a replacement for real-life advice, so make sure to consult a tax professional before moving forward.

[#RothConversion](#) [#RothIRA](#)

■ US Individual Income Tax: Tax Rates for Regular Tax: Highest Bracket
■ US Individual Income Tax: Tax Rates for Regular Tax: Lowest Bracket

Year	Highest Bracket Rate (%)	Lowest Bracket Rate (%)
1920	70	10
1925	25	10
1930	25	10
1935	25	10
1940	25	10
1945	70	10
1950	70	10
1955	70	10
1960	70	10
1965	70	10
1970	70	10
1975	70	10
1980	50	10
1985	50	10
1990	30	10
1995	30	10
2000	30	10
2005	30	10
2010	30	10
2015	30	10
2020	37	10

FMG “downloads” section has GREAT VISUALS




These slides also make for GREAT social posts!


#4


You never get personal


Share a personal story or photo, tie into how you help if you can

 **Derek N.H. Notman, CFP®** · 1st
Founder & CEO @ Couplr.ai = Solving the Client Acquisition & Orphan...
5d · 🌐


Your kids don't care how much you make or how successful you are.
They won't remember the deals you closed, BUT will remember the d ...see more




 You and 57 others 26 comments · 1 repost

 **Emily Casey Rassam CFP®, C...** (She/Her) · 1st
Investopedia Top 100 Advisor 2023 | He...
[Book an appointment](#)
6d · Edited · 🌐

🤔 How do you feel when you look at your credit card balance after a trip?
...see more



👉 Takeaways 👉 How do you soothe yourself after an expensive >

 45 46 comments · 1 repost

#5

You have no opinion

Make a bold statement.

Say something different.

Have a hook



Samantha Russell · You

Chief Evangelist at FMG Suite | Marketing + Finance+ Tech ...
2mo · 🌐

This new generation does not want a financial advisor.

They want a life coach with a side of financial planning and it ...see more



Contact Us Our Sites ⓘ 🔍

Young investors will soon represent a preponderance of the population and wealth

Gen Y and Gen Z now represent 47% of the U.S. population (U.S. Census Bureau, 2021),¹ but only 14% of advisory clients.²

They already inherit an estimated \$541B each year (30% of the wealth transferred annually today).³

Many young investors are pro-advice

63% of Gen Y/Z believe a professional financial advisor is important to achieve financial and/or investment success⁴ compared to 56% of Baby Boomers+

Millennial and Gen Z clients can be an engine of growth

Contrary to the beliefs of many advisors, young investors can be attractive and profitable clients, especially over time. They value and are willing to pay for the advice of professionals, and are motivated to improve their finances, prefer to consolidate assets with a primary advisor, and are loyal clients. They also are at ages when they first start to establish a financial advice relationship.

66% of Gen Y/Z want to consolidate more assets with primary financial advisor⁴ compared to 19% of Baby Boomers+

74% of 30-39 year olds are willing to pay for advice compared to 50% of 70+ year olds⁵

👍❤️👍 Stuart Farst and 358 others

58 comments · 20 reposts



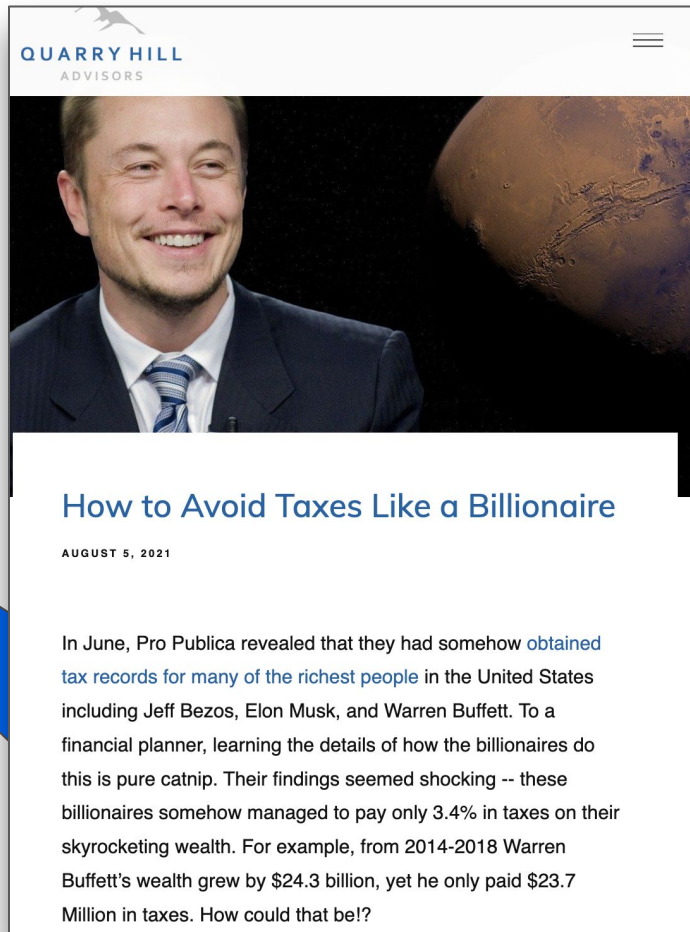
Like

Comment

Repost

Send

How you phrase things matters



The image shows a screenshot of a website article. At the top left is the logo for 'QUARRY HILL ADVISORS' with a small graphic of a person jumping. At the top right is a hamburger menu icon. Below the header is a large image of Elon Musk smiling, with a view of Mars in the background. Below the image is the article title 'How to Avoid Taxes Like a Billionaire' in blue text, followed by the date 'AUGUST 5, 2021'. The main text of the article is in black and discusses tax records for wealthy individuals.

QUARRY HILL
ADVISORS

How to Avoid Taxes Like a Billionaire

AUGUST 5, 2021

In June, Pro Publica revealed that they had somehow [obtained tax records for many of the richest people](#) in the United States including Jeff Bezos, Elon Musk, and Warren Buffett. To a financial planner, learning the details of how the billionaires do this is pure catnip. Their findings seemed shocking -- these billionaires somehow managed to pay only 3.4% in taxes on their skyrocketing wealth. For example, from 2014-2018 Warren Buffett's wealth grew by \$24.3 billion, yet he only paid \$23.7 Million in taxes. How could that be!?

#6

You are not consistent



Do It For Me Calendar | October

Monthly checklist

- Check out the content recommendations.
- The default is to send emails to ALL contacts and social posts to LinkedIn. If you want to select a more targeted group, let us know in your email reply.
- Reply to the email "Approved" and we'll get started on scheduling your marketing for the month!

Key

- Email (E)
- Social media (S)
- Blog (B)
- FMG automation

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
25	26 S: Rosh Hashanah	27 E: 10 Mistakes Derail (Prospects Only)	28	29	30 S: Good Morning Routines	1 S: International Coffee Day
2	3 S: Breast Cancer Awareness Month	4 E: Will Your SS Check Be Taxed? B: Will Your SS Check Be Taxed?	5	6	7 Monthly Market Insights	8
9	10 E: Cybersecurity Month: 7 Steps to Protect Yourself	11 S: Cybersecurity Month: 7 Steps to Protect Yourself	12 B: Cybersecurity Month: 7 Steps to Protect Yourself	13	14	15
16	17	18	19 E: Charitable Giving Strategy	20 S: Interesting Financial Education	21	22
23	24 B: The Pros & Cons of ESG Investing	25	26 S: What is Something You Splurge On?	27 E: The Pros & Cons of ESG Investing	28	29
30	31 Halloween S: Happy Halloween					



Hello,

Given the announcement today that the consumer price index rose 0.2% in June and was up 3% from a year ago, the lowest level since March 2021, we wrote the below **Timely** Social Post to demonstrate your thought leadership and reiterate the benefit of working with a financial advisor. We are happy to post this to social media on your behalf.

For Your Review & Approval:

Social Post: [CPI Lowest in 2 Years](#)

Please reply to this email to let us know if you would like the social post sent out! Include a note for the email to say:

1. **Social post is approved as is. Send it out!**
(We will schedule this social post without changes. Note: there may be a lag if the post needs to be approved by your compliance team.)
2. **Social is approved with changes.**
(Let us know what text changes you would like for the social post.)

Important Reminders:

** If you have self-managed compliance, be sure you log into your **FMG***



REMEMBER: Follow the 80/20 Rule



For every **1** thing you post to your own feed,
Comment on at least **5** other people's posts

Comments are currency.

Ask questions that are “easy” to answer to get more comments

7 TOPICS TO CONSIDER
CHRIS BUCKLEY
(Financial Advisor)

- 1 Leaving a financial legacy for a charity
- 2 Caring for elderly parents
- 3 Need for care if you become hurt or sick
- 4 Leaving a financial legacy for your children
- 5 Coping with a significant market downturn
- 6 Maintaining assets to meet lifetime income needs
- 7 Ensuring your partner/spouse is taken care of should you pass away first

Rank the topics based on your level of concern

Advisors
March 21 at 8:01 PM · 🌐

Getting ready to have your first meeting with a financial advisor? Here are 7 Topics to consider in advance. Sit down and really think about what is important to you.
#financialplanningstartswithme
#leavingalegacy #somethingtothinkabout

1 4 1

Like Comment Share

Most relevant ▾

Which topic is most important to you?

1w Like Reply

Angelle Maurin Buckley
It's hard to pick just one. 6,7, 2 come to mind at this season in my life.
1w Like Reply

Kathy Norfleet
3 & 6
1w Like Reply

Marsha Byokawski
6,2
1w Like Reply

Write a comment...

Get The Conversation GOING

Let's Talk About What You Wish You Knew Before Retiring:

“Those planning to retire - ask a question

Those already retired - answer one!”



let's help each other

mamas under 30 ask a question

mamas over 30 answer a question

#7

You don't tap into your (local, or niche) community

Facebook Groups are really underutilized by advisors.

There are local groups in every area in our country

Gig Harbor Moms
Anonymous member · Dec 27, 2023 · 🌐

Looking for a financial advisor for our personal finances and also for an S Corp business. Any recommendations?! Thank you!

4 Answers

👍 Like 💬 Answer

Gig Harbor Moms
[Redacted]

Hello, my husband and I are seeking a local reliable financial advisor. We never had one before so any advice would be greatly appreciated! 😊 ✨ Thank you!!

👍 1 11 Answers

👍 Like

Gig Harbor Moms
[Redacted] 23 · 🌐

To piggy back off the other mom's post:

We have a decent income, but I'd love to make it go further. Financial advisor suggestions? We've been saying we'd do this for YEARS and I am finally going to do it 🙌

👍 7 10 Answers



Eric J. Negrón, CEPA®  · 1st

13h ...

Empowering Executives, Entrepreneurs, and Small Businesses to Red...

Samantha Russell I just dropped my Facebook group prospecting strategy on the **EncorEstate Plans** podcast with **Matt Morris** . We brought in 20 new clients last year leveraging Facebook groups with some unique tactics



Caleb Pepperday, CFP®

@CalebPepperday



I've been the benefactor of this. It's really cool to see when your biz gets posted in a group that you're not even a part of. It's been a big referral source for me.

DO NOT SHAMELESSLY
SELF PROMOTE.

Post helpful answers.

Also have colleagues
tag you and say “Could
you help?”



Anonymous member's Post



Anonymous member

October 19, 2022 · 🌐

My husband and I are looking for a financial advisor. Mainly for retirement purposes. Does anyone have recommendations they have used? Thanks!



2

22 comments



Top comments ▾



Tricia Roth Top Contributor

We work with Evergreen Wealth Management out of Williamsport. Were happy with them.

1y Like Reply



Sara Bamat

Second vote for Chris Smith with Northwestern, he's great!!

1y Like Reply



Molly Lucas-Beck

David Panko or Ash at Strong Tower Associates, both in State College.

1y Like Reply Edited



Natalie Smithmyer

Stephanie Harris Gordon can you be of assistance? ...

1y Like Reply



Stephanie Harris Gordon

Natalie Smithmyer sure

We can help. Joe does financial roadmaps for free for people all the time. Please reach out to me at [REDACTED] or visit us at [REDACTED]



Thomas Cook
Top Contributor · March 11 at 7:53 PM · 🌐

Thank you to everyone that came out Saturday to the exhibition match: Pickleball Pro vs Local Legends! I took notes from Tito's coaching that I'm willing to share if you just DM me. To say thank you to anyone that came out, I'm offering a free 2023 tax review which includes a tax summary you can keep with helpful observations on how to lower your lifetime taxes. Send me an email or book a meeting through my website. Info in comments.



👍 Heather Medicare Majka, Gordon Young and 19 others

Top Contributor · March 4 at 9:38 PM · 🌐

My husband and I are coming in on Thursday the 7th thru the 10th of March to tour Tellico Village and the surrounding area. What are some suggestions on fun places to see , night life and great places to eat.

👍👍 You, Heather Medicare Majka and 11 others

57 comments

👍 Like

💬 Comment

📄 Send

Top comments ▾



Write an answer...



Thomas Cook Top Contributor

Saturday March 9th there is an exhibition pickleball match at TV wellness center between the #39 player in the world and the best players at TV! Should be a well attended event if you want to make some friends. The pickleball community has the nicest people.

...

👍 3

3w Like Reply



Thomas Cook Top Contributor

12:30-1:30pm

3w Like Reply

Helpful tip: once you move from out-of-state, you'll want to update your estate planning documents to reflect TN laws. KG&B is the best firm in town in my opinion (no affiliation with them). I'm teaching a free course on estate planning at the TV library April 16 at 10am

Great Example of how to use Facebook Groups:
Thomas Cook

Practical Tips: Your Profile



Chris DeWolfe · 2nd

Managing Partner at Investment Consulting G...

[Book an appointment](#)

2w ·

[+ Follow](#) ...

Are election years typically good years for the stock market?

For those who are curious, here's some interesting historical ...see more

S&P 500 Annual Stock Market Returns During Election Years

2000	-9.1%	Bush vs. Gore
2004	10.9%	Bush vs. Kerry
2008	-37.0%	Obama vs. McCain
2012	16.0%	Obama vs. Romney
2016	12.0%	Trump vs. Clinton
2020	18.4%	Biden vs. Trump

Stocks are measured by the Standard & Poor's 500 Composite Index, which is an unmanaged index considered to be representative of the overall U.S. stock market. Index performance is not indicative of the past performance of a particular investment. Individuals cannot invest directly in an index. The returns and principal values of stock prices will fluctuate as market conditions change. Shares, when sold, may be worth more or less than their original cost.

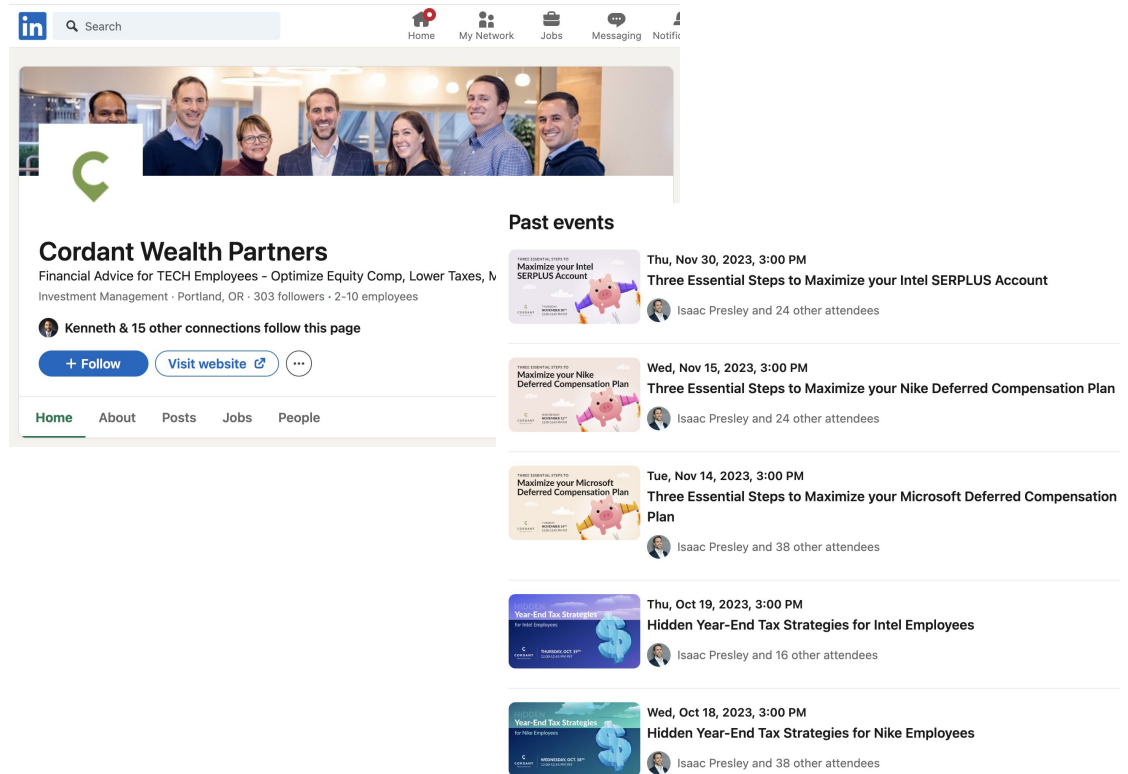


2 comments

NEW: Add a CTA to your LinkedIn Profile - it is a link that will ALWAYS appear under your name

NEW: Create a LinkedIn Event To Promote Webinars

- Create an event for each individual webinar
- You can invite people directly FROM linkedin and they REGISTER from LinkedIn
- Connected to 500 Nike employees? Filter and invite them all
- You can still use ZOOM to host



The screenshot displays the LinkedIn profile for Cordant Wealth Partners. The profile header includes the company name, a description: "Financial Advice for TECH Employees - Optimize Equity Comp, Lower Taxes, Investment Management · Portland, OR · 303 followers · 2-10 employees", and a notification that "Kenneth & 15 other connections follow this page". Navigation buttons for "Follow" and "Visit website" are visible. Below the profile, a "Past events" section lists five events:

- Thu, Nov 30, 2023, 3:00 PM**
Three Essential Steps to Maximize your Intel SERPLUS Account
Isaac Presley and 24 other attendees
- Wed, Nov 15, 2023, 3:00 PM**
Three Essential Steps to Maximize your Nike Deferred Compensation Plan
Isaac Presley and 24 other attendees
- Tue, Nov 14, 2023, 3:00 PM**
Three Essential Steps to Maximize your Microsoft Deferred Compensation Plan
Isaac Presley and 38 other attendees
- Thu, Oct 19, 2023, 3:00 PM**
Hidden Year-End Tax Strategies for Intel Employees
Isaac Presley and 16 other attendees
- Wed, Oct 18, 2023, 3:00 PM**
Hidden Year-End Tax Strategies for Nike Employees
Isaac Presley and 38 other attendees



Source:
<https://www.linkedin.com/company/cordant-wealth-partners/>

1. Set Up Personal AND Business Pages

Step 1: Claim your business name/profile on BOTH regardless

Step 2: Establish a face for your brand

Step 3: Have employees/personal pages share content that tags the business page, or re-share content from business page. Expect Personal page to perform better



fmg FMG
13,931 followers
1mo · 🌐

Get more engagement from your social media strategy with these 🔥 tips
[Samantha Russell!](#)

Which one is your favorite? Or which one are you work

Let us know! 🌟

Samantha Russell · You
Chief Evangelist at FMG Suite | Marketing + Finance
1mo · 🌐

🔴 Social Media Content for Financial Advisors: 6 Posts with the Most Engagement:

7 POST IDEAS TO BOOST I

Katherine "Kat" Turner and 4 others

Samantha Russell · You
Chief Evangelist at FMG Suite & Twenty Over Ten | Investment News 40 ...
1mo · Edited · 🌐

🔴 10 Biggest Website Mistakes Financial Advisors Make

1:05 🚩 Not Writing Homepage Correctly
2:41 🚩 Not Having 2 Compelling Calls To Action
3:33 🚩 Not Making Your Calls To Action Compelling Enough
4:40 🚩 Not Including A Meeting Scheduler On EVERY Page
5:10 🚩 Having More Than 5-7 Main Pages In Your Navigation
5:39 🚩 Having TOO MUCH Text
6:10 🚩 Choosing The Wrong Photos
7:00 🚩 Not Having a 30-90 Second Intro Video
7:41 🚩 Not Regularly Updating Your Website 2x A Month
8:14 🚩 Not Paying Attention To The Technical Basics

ALL websites should be a constant work in progress. Which of these do you think you could most improve on?

[#wealthmanagement](#) [#websitedesign](#) [#copywriting](#)

James Pollard Rachel Hanley Amanda Larson Niki Clark, FPQP Kirk Lowe Stuart Farst Karissa Hinton Susan Theder

10 BIGGEST WEBSITE MISTAKES

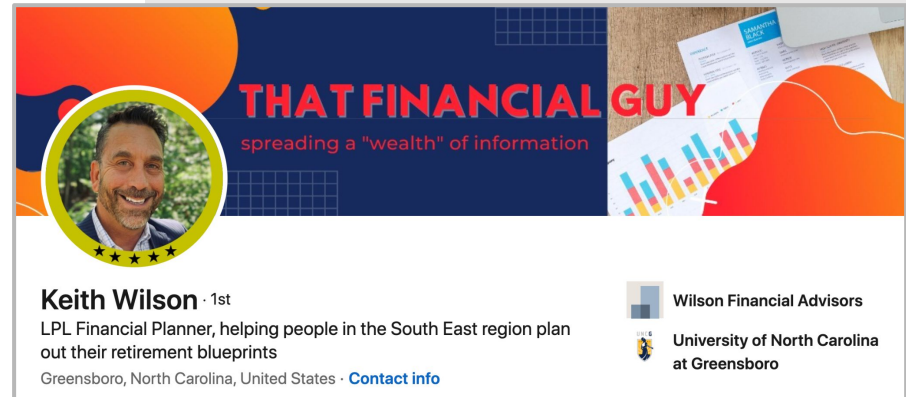
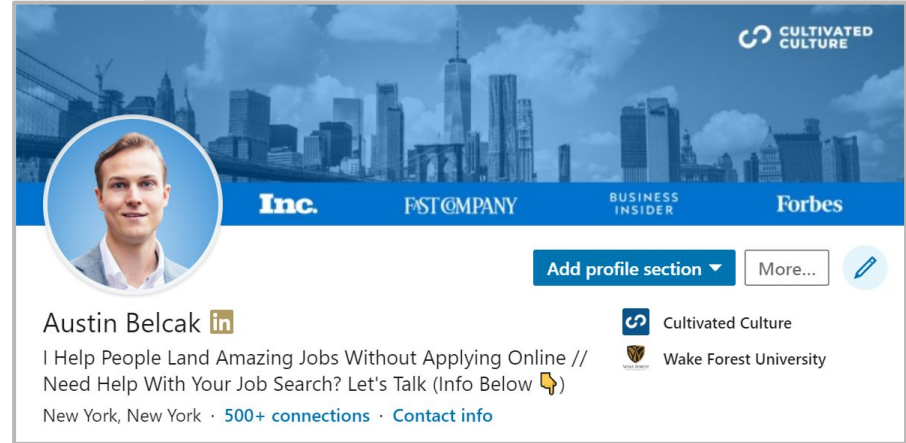
You and 124 others
32 comments · 5 shares

Like Comment Share Send

15,995 impressions [View analytics](#)

2. Upload an A+ Headshot & Banner Image

1. Use a **high-resolution image**
2. Make sure photo LOOKS like you
3. **SMILE** (show your teeth)
4. Wear what'd you'd wear to work
5. Take the photo in **natural light**
6. Create a **Custom Banner Image** using Canva (1128 (w) x 191 (h) pixels)
7. **Choose a template here:**
<https://www.canva.com/linkedin-banners/templates/>



3. Write a Great Headline

1. Articulate your unique value.
“I help people _____ and my approach is different because _____.”
2. Use the 120 Characters wisely!
3. Don't be gimmicky



GUIDE
JENAVIVIANO.COM/FACELIF

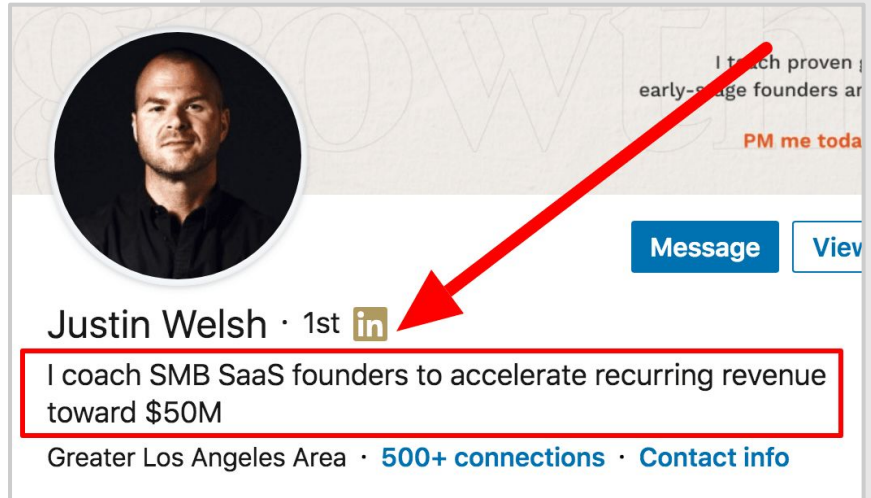
 Follow View


Jena Viviano · 2nd 


Career Strategist to \$100k+ Women | Faith & Work | Personal Branding | Speaker |  Your Career Story

Franklin, Tennessee · 500+ connections · [Contact info](#)

A red arrow points from the top right towards the headline. The headline is enclosed in a red rectangular box.



 Message View

Justin Welsh · 1st 

I coach SMB SaaS founders to accelerate recurring revenue toward \$50M

Greater Los Angeles Area · [500+ connections](#) · [Contact info](#)

A red arrow points from the top right towards the headline. The headline is enclosed in a red rectangular box.

Social Media Mistakes

Practical Tips: Growing

4. Personalize your LinkedIn URL

1. Follow [these instructions](#) to personalize
2. Best to edit for SEO purposes
3. A good URL may contain just your name, your name plus your title, or your name plus your certification.

Examples:

- <http://www.linkedin.com/in/AllenJohnson>
- <http://www.linkedin.com/in/AllenJohnsonFinancialAdvisor>
- <http://www.linkedin.com/in/AllenJohnsonCFP>





The screenshot shows a LinkedIn profile page for Samantha (Culovic) Russell. The browser address bar at the top displays the URL `linkedin.com/in/samanthacrussell/`, with a red arrow pointing to it from the top right. The profile header features a circular profile picture of Samantha, a banner image with the text "The Intersection of Digital Marketing, Technology and Financial Services", and the name "Samantha (Culovic) Russell". Below the name is her title: "Chief Evangelist at FMG Suite & Twenty Over Ten | I help Financial Advisors accelerate growth through inbound marketing | Message me to learn more ↴ | & FOLLOW ME for daily digital marketing tips to generate business". To the right of the profile information are two logos: "FMG Suite" and "Miami University".

5. Turn Your Summary Into Your Story

1. **NEVER** leave the summary section blank!
2. Don't just list jobs + skills. Tell your story
3. Bring to life why your skills matter – and the difference they make to the people you work with.
4. Write in **1st Person!**
5. Don't forget the “Featured” section - highlight awards, your best content, etc



 **Samantha (Culovic) Russell**
Chief Evangelist at FMG Suite & Twenty Over Ten | I help Financial Advisors accelerate growth through inbound marketin...

About 


How financial advisors and clients find each other has changed forever. I help successful business owners understand how digital marketing can transform the way they find and engage clients today, and 10 years from now.


My passion is helping financial advisors understand digital marketing strategies and switch their mindset from an "outbound cold sales" to a "warm inbound" approach. The strategies I teach (including optimal website design, SEO, content marketing, social media and video) have helped thousands of advisors to experience significant organic growth and new business over the last five years.

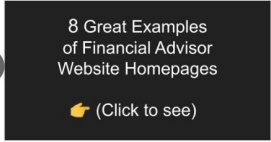
Over 10,000 financial professionals have heard me deliver this message on stage at financial conferences, and even more have read about it in the pages of well-known industry publications.

In 2020, I was honored with the InvestmentNews 40 Under 40 award and that same year was honored to be named to the "10 to Watch" list by WealthManagement.com.


I was part of the original five person team that launched Twenty Over Ten and now serve as Chief Evangelist at FMG Suite. There is nothing I find more inspiring than being able to empower advisors to market themselves effectively, and I get a thrill from each message I receive from those financial advisors who are enjoying returns on their marketing investments.


Featured 

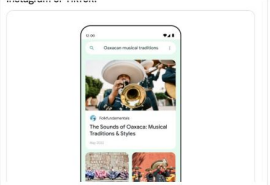
Post  What to know what NOT to put on the home page of your...





8 great website examples


 95 · 40 comments


Post  Every Business Owner Should Be Paying Attention to This:...



 81 · 36 comments

Post  This is the marketing trend you need to be paying atten



 157 · 37 comments

The Calendar Connection Tactic

Step 1

Every Friday, Go through the last 5 days of your calendar (and email too if you want extra connections!)

Step 2

Copy the person's name, look them up via LinkedIn

Step 3

Invite them to connect on LinkedIn—that's it!

The image shows a LinkedIn search interface with the search bar containing "Crumling, Kirsten". The search results list three profiles for "kirsten crumling": a 2nd-degree connection (Project Manager at SEI Inves...), a 3rd-degree connection (Student at West Chester U...), and another 3rd-degree connection. A "See all results" link is visible below the list.

Overlaid on the bottom right is a Microsoft Teams meeting invite for "FMG/SEI Growth Lab partner planning for August campaign" on Friday, July 1, from 2:00 to 3:00 pm. The invite lists 5 guests: Samantha Russell (checked in), Amy Galli, **Crumling, Kirsten** (highlighted), Karissa Hinton, and Susan Theder.

The Email Connection Tactic

Step 1

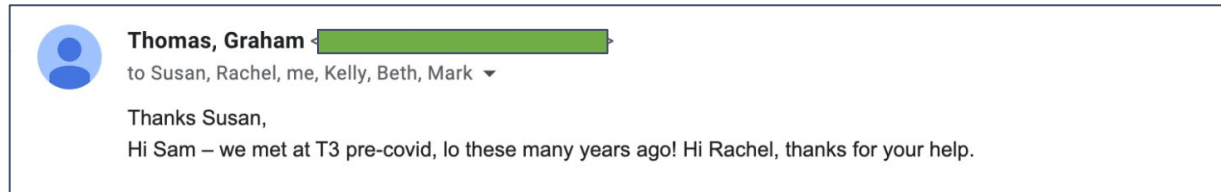
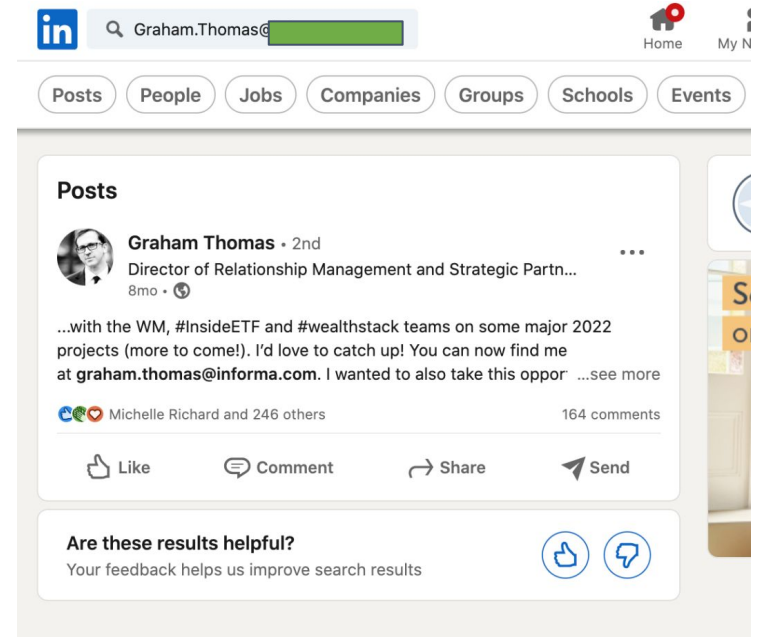
Every Monday and Friday, Go through the last few days of emails and connect with anyone you exchanged messages

Step 2

Copy the person's email address, search in LinkedIn

Step 3

Invite them to connect on LinkedIn – that's it!



FMG Can Help



Do It For Me Calendar | April 2024

Check out the content recommendations.

The default is to send emails to ALL contacts and social platforms that are connected. If you want to select a more targeted group, let us know in your email reply.

Let us know if you've added any new clients this month so we can be sure to send them the New Client Welcome Series and add them to your ongoing campaigns.

Key

- Email (E)
- Social media (S)
- Blog (B)
- FMG automation

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATI
31 Easter	1	2 B: Give Your Children the Gift of Financial Literacy S: April Is National Financial Literacy Month	3 E: Empower Your Children with Financial Literacy Skills	4	5 Monthly Market Insights S: Financial Friday: Tips for Teaching Children & Teens	6
7	8	9	10 S: National Siblings Day	11		
14	15 Tax Day S: Tax Day: April 15, 2024	16 Video of the Month B: Create a Strategy to Protect Your Wealth with Potential Estate Tax Changes Looming S: National Healthcare Decisions Day: April 16	17 E: TCJA - Impact on Estate and Gift Strategies	18		
21	22	23 S: Motto for April	24	25		

Blogs

- April 2: Give Your Children the Gift of Financial Literacy
- April 16: Create a Strategy to Protect Your Wealth with Potential Estate Tax Changes Looming

Emails

- April 3: Empower Your Children with Financial Literacy Skills - COI Version
- April 17: TCJA - Impact on Estate and Gift Strategies - Clients and Prospects
- April 17: TCJA - Impact On Estate And Gift Strategies - COI Version

Social Posts

- April 2024 DIFM Educational Social Sequence
 - April 2: April Is National Financial Literacy Month
 - April 10: National Siblings Day
 - April 15: Tax Day: April 15, 2024
 - April 16: National Healthcare Decisions Day: April 16
 - April 23: Motto for April - HOPE - Have Only Positive Expectations
- April 2024 DIFM Financial Friday Tips Social Sequence
 - April 5: Financial Friday: Tips for Teaching Children & Teens About Finances
 - April 12: Financial Friday: Social Security Month
 - April 19: Financial Friday: TCJA and The Impact on Estate & Gift Strategies
 - April 26: Financial Friday: Preparing for Homebuying Season

FMG Automation

- Monthly Market Insights - Social Post and Email: Around the 7th of Each Month
- Video of the Month - Email Only: Third Week of Each Month

Additional Content Options - these can be used in addition to or swap out with other social posts

Social Posts

- April 1: April Fools' Day
- April 2: World Autism Awareness Day
- April 7: World Health Day
- April 8: National Library Week
- April 22: Earth Day
- April 22: Passover
- April 24: Administrative Professionals Day
- April 26: Celebrate Arbor Day: April 26, 2024
- 4 optional timely social posts (social assists) per week

Optional Email

- April 29: DIFM Prospect Email re: Customer Experience

Every Month Add New Clients To:

- New Client Welcome Series
- Center of Influence Campaigns
- Monthly Market Insights
- Birthdays

Don't Forget About...:

- Prospect Email Sequence

View Complete List of All DIFM Blogs [Here](#)
View Complete List of Niche/Special Content [Here](#)

Marketing Tip:

- Surprise and delight the tax professionals and CPAs in your network. It's their busiest time of the year and dropping off or sending a food basket would be sure to make an impact. Or try Goldbelly to ship delicious food from anywhere in the country! It's an opportunity to show you're thinking about them that will likely pay dividends down the line!

All content and timelines are subject to your Broker/ Dealer compliance and approval.

Willing to give a testimonial about DIFM? We would love that! Please click [here](#) for more information.



Advisors Love Our “Do It For Me” Program

We got a client because of you guys. They were reading the emails you sent out, they made an appointment, and we are working together - a million dollar client. Just keep doing what you're doing. I'm not on the FMG calls so I don't know what it is, but it's definitely working. ~ *Henry H., March 2024*

Meet With Us: <https://fmgsuite.com/get-a-demo>

Questions? Marketing@fmgsuite.com

Scan QR To Talk With US

