



Writing Your Bio with Personality

Create a standout bio for your website and LinkedIn – two of your best opportunities to make a memorable first impression and connect with potential clients on a personal level.

Website About Page Checklist

✓ **Write in the first person and maintain your brand voice throughout**

✓ **Tell your professional story (not your resume)**

Share your experience, credentials, and years in the industry. Focus on why you became an advisor and your journey to where you are today.

EXAMPLE:

"I started my career after watching my parents struggle with retirement planning. That experience showed me how much peace of mind the right financial guidance can provide."

✓ **Explain who you serve and how you help them**

Identify your niche or what connects your clients. Highlight what gives you unique insight into their values and pain points, and mention specific services that address their needs.

✓ **Share your life outside the office**

Include personal details: family, hobbies, volunteer work, or interests. These conversation starters help potential clients relate to you as a person.

✓ **Use conversational, accessible language**

Write the way you'd speak to a friend. Avoid jargon and keep it warm and approachable.

EXAMPLE:

Instead of "fiduciary asset allocation strategies," say "I help you invest in a way that matches your goals and comfort with risk."

✓ **Evoke the right emotion**

End with content that supports how you want clients to feel – understood, relaxed, or secure.

✓ **Include a brand-aligned call to action**

Skip generic phrases. Use language that reflects the feeling you want clients to experience.

EXAMPLE:

Instead of "Schedule a consultation," try "Let's discuss your financial future."



LinkedIn Profile Checklist

✓ Set up both personal AND business pages

Claim your business name/profile on both. Establish a face for your brand, and have employees share content that tags the business page. Personal pages typically perform better than business pages.

✓ Upload an A+ headshot and banner image

- Use a high-resolution image that looks like you today
- Smile and show your teeth
- Wear what you'd wear to work
- Take the photo in natural light
- Create a custom banner image using Canva (1128 x 191 pixels)



Use [Google's Nano Banana AI tool](#) to turn any photo into a professional headshot.

✓ Evoke the right emotion

Articulate your unique value using this format: "I help people _____ and my approach is different because _____."

Use your characters wisely and avoid being gimmicky.

✓ Personalize your LinkedIn URL

Edit your URL for SEO purposes. A good URL contains just your name, your name plus your title, or your name plus your certification

EXAMPLE:

linkedin.com/in/johnsmith or linkedin.com/in/johnsmith-cfp

✓ Turn your summary into your story

- Never leave the summary section blank
- Don't just list jobs and skills – tell your story
- Bring to life why your skills matter and the difference they make to the people you work with
- Write in first person
- Use the "Featured" section to highlight awards and your best content

Ready to Tell Your Story?

Our experts can help you tell your story with personality, modernize your website, implement best practices, and optimize your entire digital marketing approach to attract more qualified prospects.

[Book My 20-Minute Consultation](#)