



Turn Your **About Page** Into Your **Best** **First Impression**



HAPPENING **LIVE!**

Your First Impression

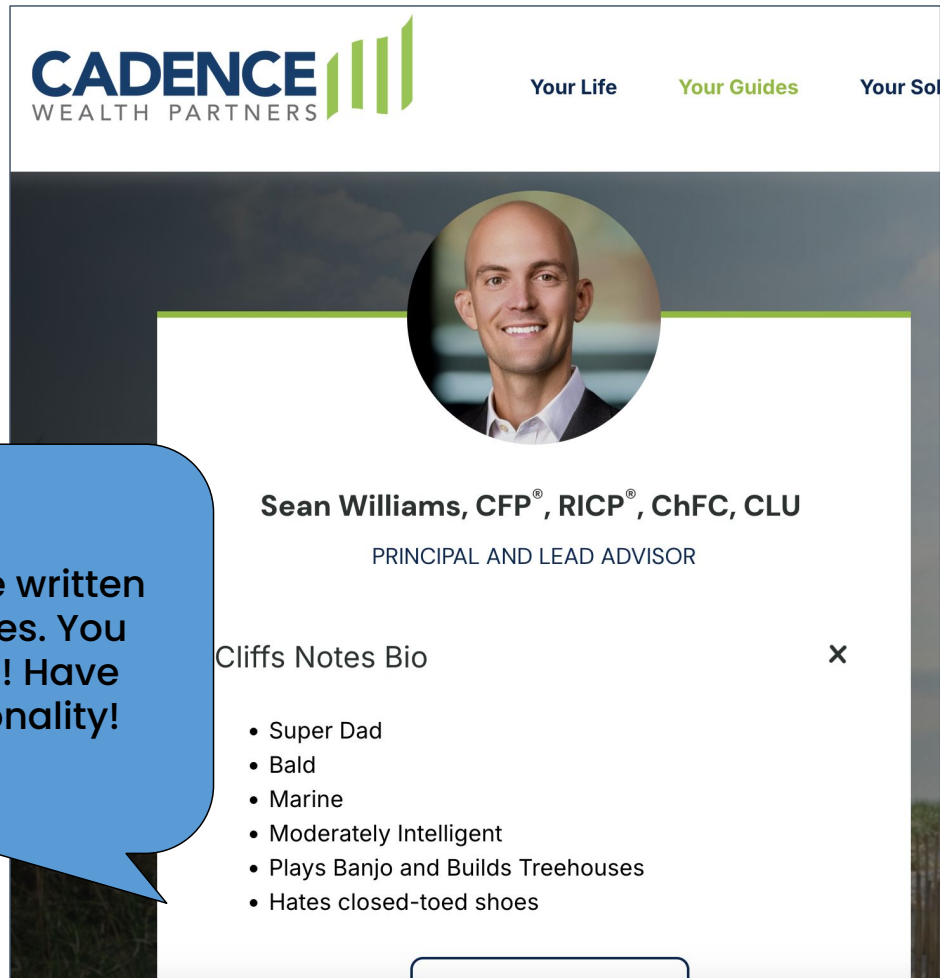
01

Your Bio On Your Website

3 Most Visited Pages On Advisor Websites:

1. Home
2. Bios/About
3. Contact

Most Bios are written like obituaries. You aren't dead! Have some personality!



Source: <https://www.cadencewealthpartners.com/your-guides>



Write your Bio in 1st person to tell a story and build a connection. Love that she loves Wordle and used it as her background!

YERIM HAHM

In August 2021, I quit my job in healthcare services in Ohio, signed a lease in Washington, and began an amazing yet terrifying 2500-mile road trip with my Border Collie, Mika.

I didn't know it at the time, but within a month of moving, I made the (relatively easy) decision to call Seattle my forever home. I took these drastic life changes with excitement about taking my first steps towards a career in financial planning!

In my family, the discussion of financial literacy took as much space as forks did at our Korean dinner table. Had my parents known about the financial tools available to them or had someone guided them, they could have spent more time celebrating life rather than worrying about it.

I wish I could have shared with my parents what I know now, but as Soren Kierkegaard wrote, "Life can only be understood backwards; but it must be lived forwards."

So here I am for the new graduates who are navigating their first and largest positive cash flow, the brilliant women who are their hometown's success story yet still feel inadequate in their finances, and those who simply want to learn more.

I joined the Flow team because Flow seemed like my kind of girl and, frankly, a lot like me. She's capable, witty, down to earth and smart with her finances. She loves anything you can call a pet and starts her mornings with today's Wordle.

Your comments are held in respect. Please do not post inappropriate comments.

Work Life:

Why financial planning?

You know, when I started Cadence Wealth Partners, I didn't dream of balance sheets or tax strategies.

I dreamed of sitting in the stands, cheering on my kids.

Of Gator game tailgates. Of being at the table for the small, everyday moments most people trade away in the name of "success."

That's what this business has given me—and that's what I want for you.

Building: building a business is hard. Building a life around it is harder.

Decisions are constant, and it's easy to wake up one day and realize you've built a cage instead of a company.

Financial planning is the key.

Financial planners create a clear financial plan—not just to grow wealth, but to finally enjoy it.

Investments, taxes, estate plan, exit strategy—all the things that can hold you back until it's too late—so you can actually live the life you want for in the first place.

Whether you're looking to grow, exit, or just finally breathe a little, we're here to help.

Let's build something that lasts.

If you feel strange writing in 1st person, try this: act like a magazine is interviewing you



Personal Life:

What is Sean like outside of work?

In my personal life, I'm a father to Graham, Caroline, and Kenny. Life mostly revolves around them at this stage, and I wouldn't trade it for anything. If I get any free time, it is typically spent in the woodworking shop, playing banjo, making something for the kids, reading, or watching Florida Gators football (although that hasn't been super productive since Tebow left).

The travel schedule has slowed down a bit since kids came along, but some of my favorite spots include France, Switzerland, Germany, Belize, St Lucia, and Cabo San Lucas. We took an RV through southern Utah this past summer and visited some of the most beautiful national parks I have ever seen.

✂ Favorite Movie = Braveheart/Dumb and Dumber

📖 Favorite Book = Lord of the Rings trilogy


📺 Favorite TV Show = Seinfeld

🍷 Favorite Food = Pre-Marine Corps, Pizza. Post-Marine Corps, literally anything except olive


🌐 Favorite Travel Spot = Cambodia

⚡ Hero = Jerry Rice/Tim Tebow

The goal is to show personality!

**KEY FINANCIAL, INC.**
With Wisdom & Care

Why Key Services Vitality Hub The Book [Schedule A Consultation](#)



See how I spend my free time!

One word that describes you best:
Approachable. This is the biggest compliment anyone could give me. While people think of me as high energy, I always want to be the person people know they can talk to.

If I could possess one super-human power:
A photographic memory!

Most cherished family tradition:
Our family tradition was saying prayers every night with our four children. It became our lifeline and a daily opportunity for the six of us to reconnect. Each of us would list three things we were grateful for and then we all went to bed remembering we are lucky and secure.

FOUNDER & FINANCIAL PLANNER

Hi, I'm Dave Grant.

I founded Retirement Matters because I saw how many executives were getting generic advice that ignored their unique challenges. Since 2007, I've worked as a CERTIFIED FINANCIAL PLANNER® (CFP®) professional, providing fee-only, fiduciary advice – which means I'm legally and ethically bound to put your interests first.

I believe financial advice should be different. No industry jargon. No canned solutions. Just clear guidance and genuine partnership. I specialize in helping executives navigate their unique compensation and benefits, along with providing expert guidance for the Illinois TRS system. My focus is creating clear retirement income strategies that make sense for your specific situation.

When I'm not helping busy professionals turn their career success into retirement freedom, you'll find me driving kids to practice, hunting for the perfect deep house track, engaged in fierce family Fantasy sports competitions, and searching for the next Netflix show to binge-watch.

What truly drives me is something deeper than credentials or specialties. It's helping executives like you identify what matters most and then building a clear financial path to get there.



Your First Impression

02

Your LinkedIn Profile



Marketing strategies to
grow your advisory firm



Ten to Watch
WealthManagement.Com



Samantha (Culovic) Russell

Helping financial advisors grow & enterprises scale through marketing strategies that actually work| Speaker | Consultant | Chief Evangelist @ FMG | Follow for daily marketing tips

University Park, Pennsylvania, United States · [Contact info](#)

49,160 followers · **500+ connections**

Open to

Enhance profile

Resources

fmg FMG Suite



Miami University



Top 100 Advisor (*Investopedia*)

Top 23 Millennial Advisor (*Business Insider*)



financial advice & education for **our generation.**

AS SEEN IN

BUSINESS
INSIDER

BARRON'S FORTUNE

yahoo!
finance



MORNING BREW



Thomas Kopelman  · 1st

Financial Planner Helping 30-50 year old Business Owners and Those With Equity Comp Build Wealth 💰. Co-Founder at AllStreet Wealth. Head of Community at Wealth.com

Indianapolis, Indiana, United States · [Contact info](#)

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18,045 followers · [500+ connections](#)



Matt DuToit, Cathleen Tobin, CFP®, CCFC, and 963 other mutual connections

 Message

More



AllStreet Wealth



Butler University



Guiding You Through the Most Complicated Financial Situations

wealth ANALYTICS

VictoriaKirilloff.com

divorce ANALYTICS



Victoria Kirilloff, CDFA®, NCPM®, CDS® ✓ 🔊

2nd

I help families make data driven financial decisions during life crises like divorce and death. | Founder of Wealth Analytics and Divorce Analytics. 🕊️

United States · [Contact info](#)

<https://victoriakirilloff.com/>

3,760 followers · 500+ connections

Collaborative
Divorce Solutions

**Collaborative Divorce
Solutions of Orange County**

fmg



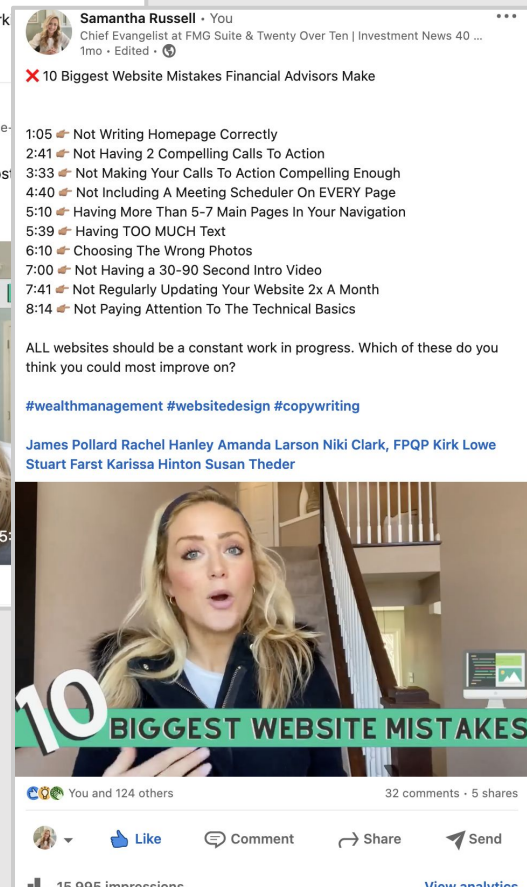
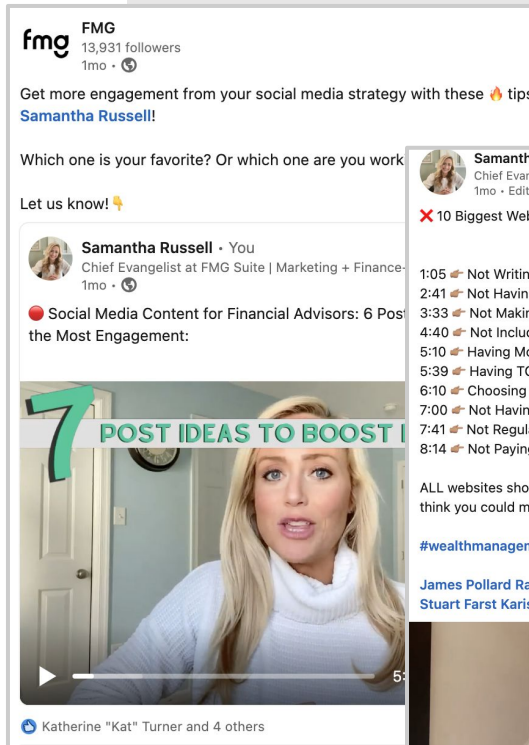
Jacob Wagner, CDMP, Deborah Price, and 37 other mutual connections

1. Set Up Personal AND Business Pages

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

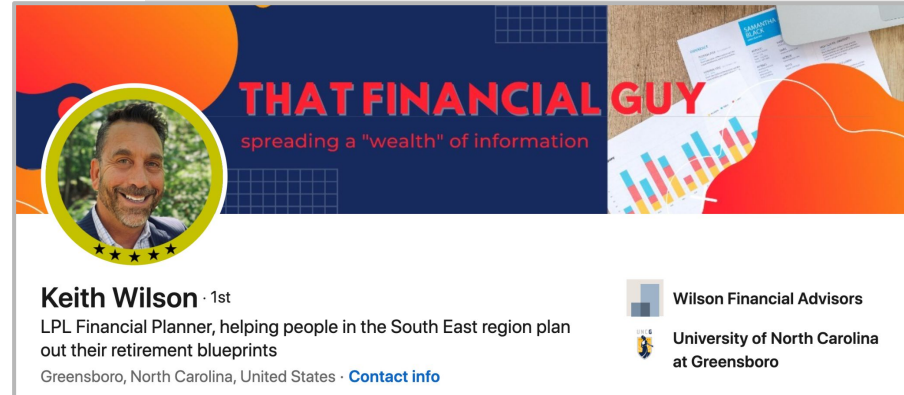
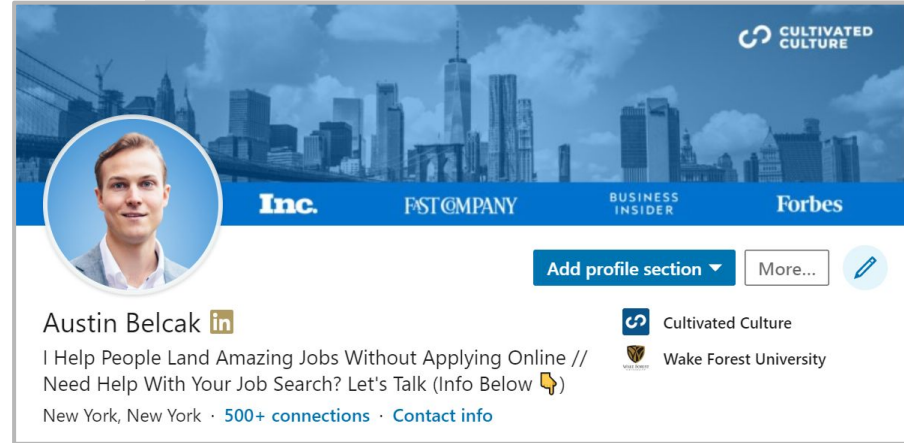
Step 2: Establish a face for your brand

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



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/EXCELLENCE

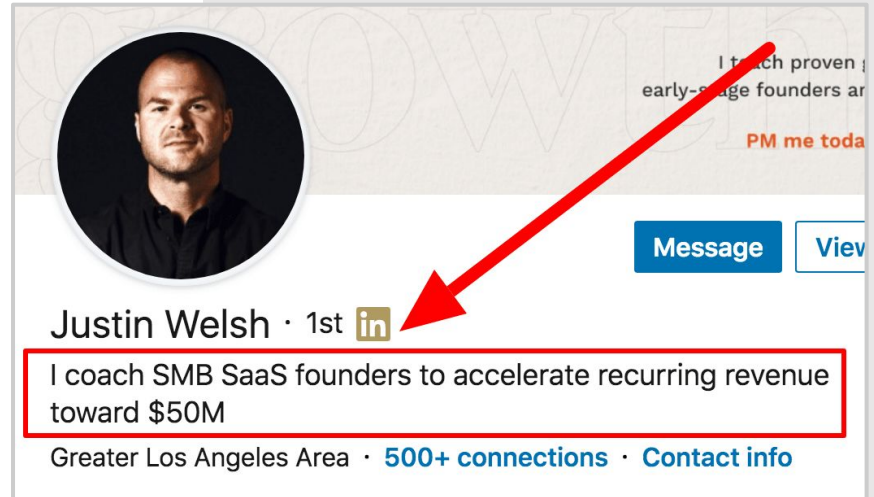
 Follow View


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 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](#)

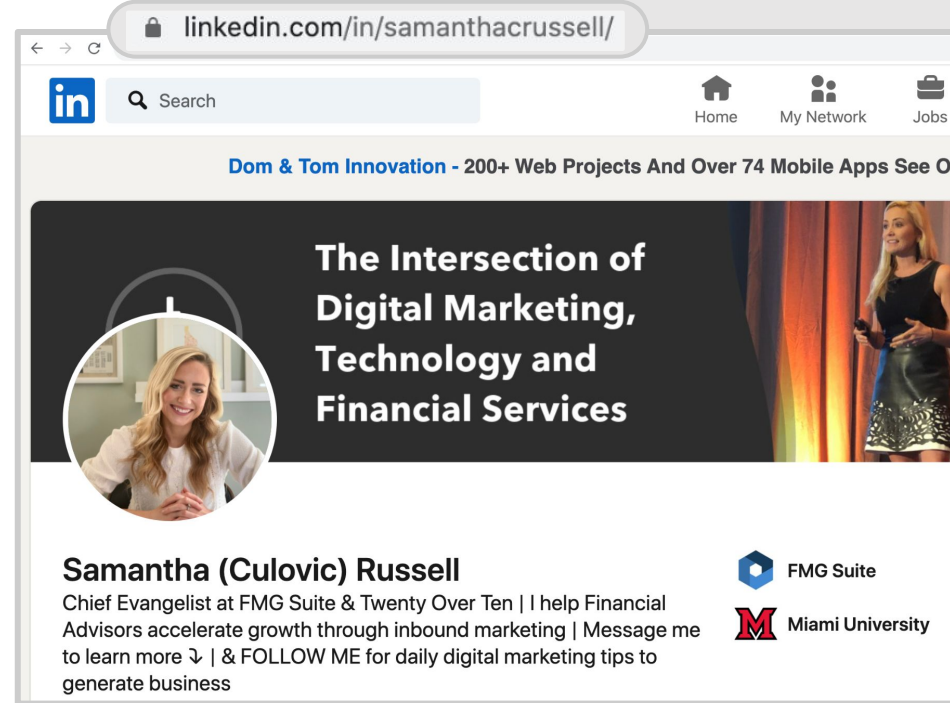
A red arrow points from the top right towards the headline box.

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>



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 Examples of Financial Advisor Website Homepages

👉 (Click to see)

8 great website examples

 95 • 40 comments

Post

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



The Sounds of Classical: Musical Traditions & Styles

 81 • 36 comments

Post

 This is the marketing trend you need to be paying atten



Zero Con WHAT NEED TO

 157 • 37 comments

Your First Impression

03

Use AI To Help

Use Google Nano Banana (Gemini 2.5 Flash Model)

For updated
Headshots, FAST

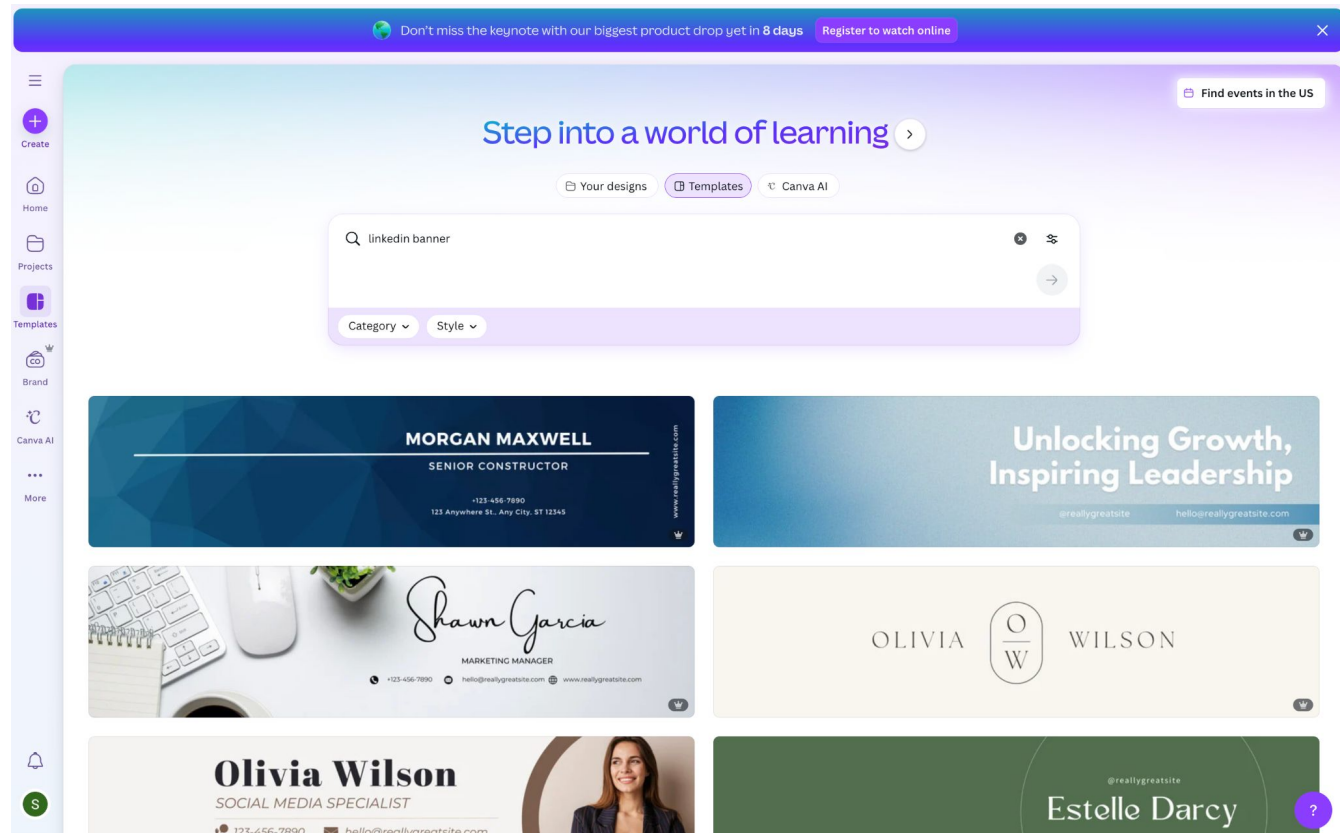
[Get our tutorial for
how here](#)

BEFORE & AFTER:



Using Google's New Nano Banana AI 2.5 Flash Image Model, I got a new headshot in seconds

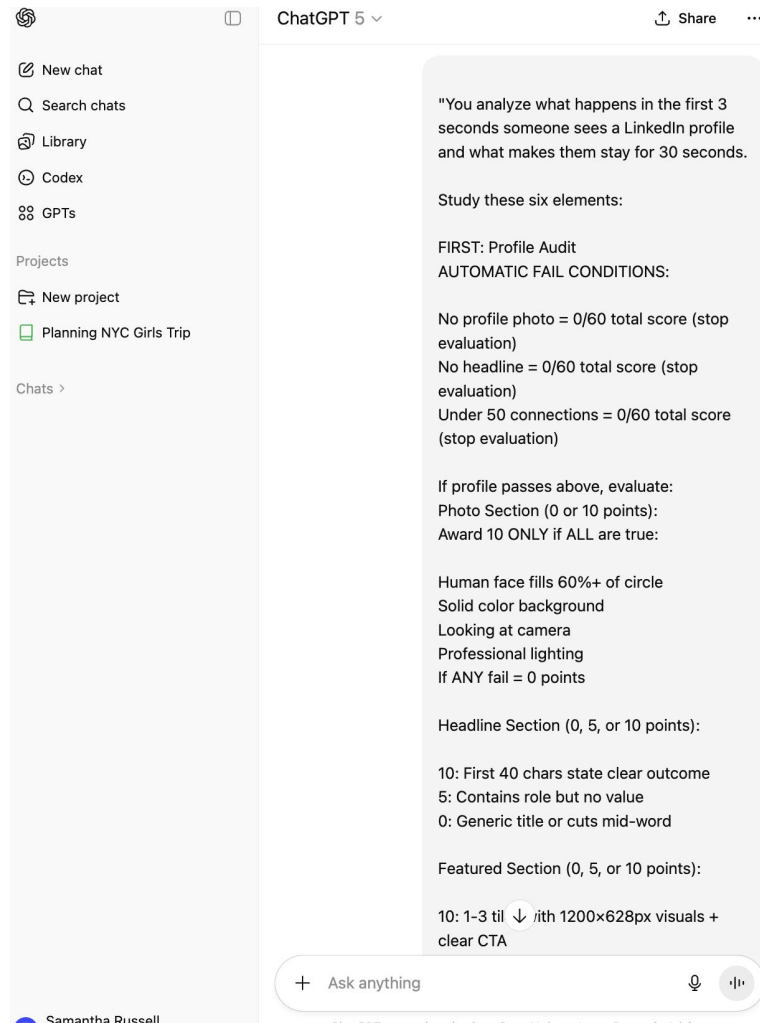
Use Canva to Create Banner Images



Use This High-Level ChatGPT Prompt to Audit and Analyze Your LinkedIn Page:

You'll need to upload screenshots of your LinkedIn:

- Profile & Photo
- Banner & Headline
- Featured & About Sections
- Experience



Want to learn more?

Book a 20-minute consult →

Questions? Marketing@fmgsuite.com

