



LinkedIn AEO Checklist

AI tools like ChatGPT, Perplexity, and Gemini are actively pulling from LinkedIn when answering financial questions – reading credentials, verifying experience, and citing articles.

Use this checklist to optimize your LinkedIn presence and boost visibility to human prospects and the AI tools evaluating who to recommend.

Your Profile

- ☐ Headline is written as a clear who/what/where statement: Role | Who You Serve | Location
- ☐ About section includes phrases prospects actually search: “fee-only advisor for physicians,” “retirement planning for federal employees”
- ☐ Summary is written in plain, conversational language – no jargon
- ☐ Certifications and designations are listed prominently (CFP®, CFA, ChFC, etc.)
- ☐ Experience section is complete and up to date
- ☐ Awards, designations, media features, and speaking engagements are listed
- ☐ Profile visibility is set to public
- ☐ Reviewed or updated in the last 90 days

Your Articles

- ☐ You’ve published at least one LinkedIn article (not just posts)
- ☐ Article titles are phrased as questions clients actually ask
- ☐ Each article answers the main question in the first paragraph
- ☐ Articles use subheadings to organize content
- ☐ Language is plain and jargon-free throughout





Your Posts

- Posts lead with a clear question, then answer it immediately – AI extracts Q&A pairs
- At least 90% of the value is in the post itself – no “click to read more”
- Posts use short paragraphs, bullets, or bolded phrases rather than walls of text
- You engage with 5–8 posts in your network in the 10 minutes before publishing

Your Presence

- Your name, credentials, and specialty are consistent across LinkedIn and your website
- Your LinkedIn profile links to your website (and vice versa)
- You’re posting consistently (at minimum 3x per week)
- Comments are set to “Anyone” so engagement is visible

Ready to grow your practice on LinkedIn?

FMG advisors save an average of 4 hours per week on marketing – and an independent study found FMG delivers a 26x ROI based on time saved, revenue lift, and lead conversions.

In a free 20-minute consultation, we’ll look at where you are today and show you exactly how our tools can help you get there.

[Book a Free 20-Minute Consult](#)