LinkedIn Profile Setup Checklist

When prospects search your name online, your LinkedIn profile is often the first thing they find. Before they book a call or visit your website, they're checking your photo, reading your headline, and scanning your summary to decide if you're worth their time.

Once everything below is checked off, you're ready to **start building the presence that puts you in front of the right people**.

Visuals

- ○ Professional, high-quality headshot (clear, recent, business-appropriate)
- ○ Banner image that reflects your brand or value proposition (firm name, tagline, or specialty)
- ○ Personalized LinkedIn URL (e.g., linkedin.com/in/yourname)

Headline

- ○ Written for AEO: includes your name, niche/specialty, and location
- ○ Goes beyond your job title – speaks to who you help and what you do for them

Summary (About Section)

- ○ Written in first person
- ○ Clearly states who you serve and how you help them
- ○ Includes a call to action (schedule a call, visit your website, connect)
- ○ Shows some personality – beyond just credentials

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Credentials & Experience

- ○ Certifications listed (CFP®, CFA, ChFC, etc.) – in headline and/or Licenses & Certifications section
- ○ Experience section filled in with clear descriptions of your work and client focus
- ○ Skills section includes terms your ideal client would search

Settings

- ○ Profile's public visibility is on
- ○ Anyone is allowed to comment on your posts