

# 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





## 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

### 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](#)