



LIVE WORKSHOP

# What's Actually Working For Advisors on LinkedIn Right Now



**Samantha Russell**  
Chief Evangelist at FMG



**Susan Theder**  
CMO & CXO at FMG

# What We'll Cover Today



01

## Why LinkedIn Has Changed

AI tools now cite LinkedIn content. The old playbook isn't enough.

02

## Profile as Authority Signal

What AI (and prospects) look for — and exactly what to fix first.

03

## The 80/20 Engagement Rule

The single habit that compounds your reach faster than posting alone.

04

## Content That Gets Cited by AI

How to write posts and articles that show up in AI-generated answers.

05

## Live Platform Walk-Through

Real examples. Real edits. Real language to steal.

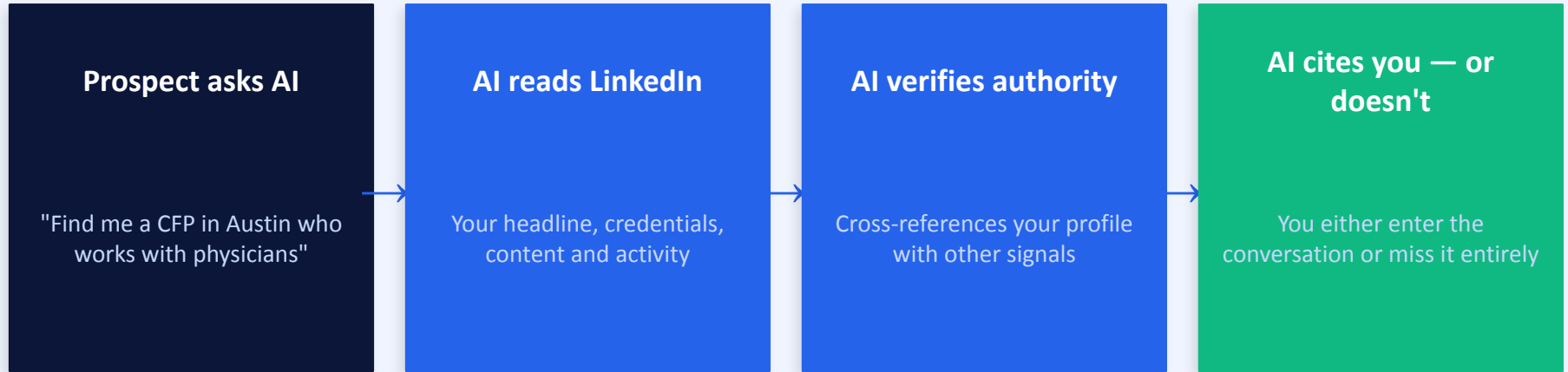
# The LinkedIn Playbook Has Changed.

AI is now your silent audience — and most advisors don't know it.



# “No one comments or likes my LinkedIn Posts”

LinkedIn is no longer a play just for awareness. It's way to get AI to recommend you.



**#2**

LinkedIn 2nd most-cited domain across AI platforms

**4–5x**

more LinkedIn citations vs. one year ago

**80%**

of those citations are LinkedIn Articles vs posts

# Your Profile: How AI & Prospects Find You

Turn high income + company stock into lasting wealth.  
I help busy tech professionals grow wealth *without adding more stress.*

Coastal Capital Advisors

**Joe Marshall** ✓ · 1st  
I exist so tech professionals don't have to stress about money. I plan for them. // Founder @Coastal Capital Advisors  
Santa Barbara, California, United States · [Contact info](#)  
[Get more out of your money](#) ↗  
12,574 followers · 500+ connections

Coastal Capital Advisors  
Westmont College

What AI (& Prospects!) read first, and how to fix yours.

# Your Headline: The Highest-Leverage Fix

Generalists get lost in the shuffle. The more specific, the more conversions you will see.

## The Formula: Role | Niche / Who You Serve | Location

LinkedIn allows up to 220 characters — use them to get specific

### Before

✗ "Financial Advisor at [Firm Name]"

✗ "Helping clients achieve their goals"

✗ "Passionate about financial planning"

### After

✓ "CFP® | Retirement Planning for Federal Employees | Greater Washington D.C."

✓ "Wealth Manager | Serving Tech Executives & Business Owners | Austin, TX"

✓ "Financial Planner for Physicians | Helping Doctors Build Wealth | Chicago, IL"

# Headline: Exactly What to Write

220 characters. Every word should earn its place.

## ROLE

*Your credential or title (the one most meaningful to your ideal client).*

✓ **Use:**

CFP®

Wealth Manager

Financial Planner

Retirement Specialist

✗ **Avoid:**

Financial Advisor (too generic)

Principal (means nothing to a prospect)

## NICHE

*Who you serve ( be specific enough that the right person says 'that's me.)*

✓ **Use:**

Physicians & Healthcare Professionals

Tech Executives & RSU Recipients

Federal Employees & FERS Planning

Business Owners Planning an Exit

✗ **Avoid:**

Individuals and families (too vague)

Anyone who wants to build wealth

## LOCATION

*Where you practice (AI uses this to match you to location-based searches)*

✓ **Use:**

Greater Chicago Area

Austin, TX

Washington D.C. Metro

Serving clients nationwide

✗ **Avoid:**

Omitting it entirely

Just a state with no city context

Turn high income + company stock into lasting wealth.

I help busy tech professionals grow wealth **without adding more stress.**



## Coastal Capital Advisors



**Joe Marshall**  · 1st

I exist so tech professionals don't have to stress about money. I plan for them. // Founder @Coastal Capital Advisors

Santa Barbara, California, United States · [Contact info](#)

[Get more out of your money](#) 

12,574 followers · 500+ connections



Coastal Capital Advisors



Westmont College

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](#)

[Apply to work with me](#) 

19,528 followers · [500+ connections](#)



AllStreet Wealth



Butler University

# Your Banner: The Most Ignored Real Estate on LinkedIn

Most advisors leave it blank. That's a missed opportunity, because it shows on every comment you leave, everywhere.



## Your specialty in plain language

"Helping physicians build wealth and protect their income" — not your firm's tagline.

## Your firm name or logo

Brand reinforcement. Prospects and referral partners notice consistency.

## Bonus: A visual cue about who you serve

An image or icon that immediately signals your niche — a stethoscope, a city skyline, a courtroom.

## Keep it uncluttered

One or two messages max. A busy banner reads as noise, not credibility.

## Use Canva — it's free

Search 'LinkedIn banner' in Canva. Pick a template, swap in your colors and text. Takes 10 minutes.

## Size: 1584 × 396px

Anything smaller looks pixelated on desktop. Design at full resolution.



# I help tech leaders prepare for complex liquidity events.

IPO READY. TAX-SMART. HEART-CENTERED.



OUR CLIENTS WORK  
AT COMPANIES LIKE



## Emily Rassam, CFP® Heart-Centered Financial Planning for Tech Leaders

She/Her · 1st

Forbes Top Woman Advisor | Investopedia Top 100 Advisor and  
Advisor Council | InvestmentNews Top Advisor | Speaker | Author |  
Wife | Mom of Two

United States · [Contact info](#)

8,734 followers · [500+ connections](#)



Archer Investment  
Management



SUNY Geneseo

# About Section: Tell a Story, Not a Resume

Write it in first person.

## Who you help + the problem you solve

P1

*"I help [specific client type] who are dealing with [specific challenge] figure out [specific outcome]."*

## How your approach is different

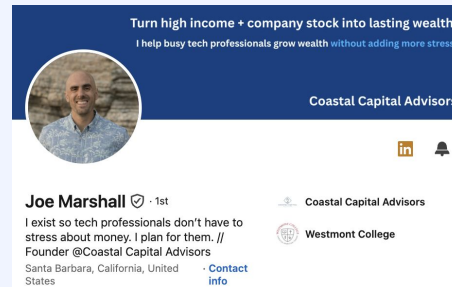
P2

*"Most advisors focus on X. I focus on Y — because what I've seen is that [insight from experience]."*

## Call to action — make it easy to take a next step

P3

*"If you're [situation], I'd love to connect. You can book a 15-minute call at [link] or message me directly."*



Turn high income + company stock into lasting wealth.  
I help busy tech professionals grow wealth without adding more stress.

Coastal Capital Advisors

**Joe Marshall** ✓ · 1st  
I exist so tech professionals don't have to stress about money. I plan for them. // Founder @Coastal Capital Advisors  
Santa Barbara, California, United States · Contact info

Coastal Capital Advisors  
Westmont College

### About

From 2016 to 2020, I was in your shoes, working a high-paying tech job. The work was demanding, and I felt the pressure and burnout. I was making great money, but I also felt stuck.

So in 2020, I decided to walk away. But, before I did, I had a hunch.

I realized the traditional financial services industry was completely ignoring high-income tech professionals like us.

They were focused on serving retirees who already had big portfolios, overlooking a huge number of people in our generation who wanted and needed planning now, not in 20+ years.

So in 2020, I decided to walk away from my job. I helped launch Coastal Capital Advisors with a single mission: to help tech employees build financial plans that simplify their money, reduce stress, and become work-optional.

Since then, I've had the privilege of helping tech professionals achieve incredible results, including:

- Planning for equity compensation to make the most of their company stock.
- Creating a clear savings and investment plan for their future.
- Developing a tax strategy to maximize their wealth over a lifetime.

I didn't figure this out overnight. It took countless hours of research, practice, and hands-on experience helping dozens of tech professionals navigate their complex financial lives.

Now, I transfer all of that hard-earned knowledge to you so you can win with your money and build a secure financial future.

---

Here's exactly how I can help you. [3](#)

Free Resources (check out my featured section)

- 1) Daily posts
- 2) Free newsletter: Get a 5-minute email on the 2x / month with practical financial tips for tech professionals
- 3) Free guide: The Financial Planning for Procore Employees Whitepaper

Work With Me 1:1

See my featured section to schedule an intro call

---

I've helped 125+ families simplify their money, build a plan for their stock and savings, and minimize taxes

I want to help YOU use your money to build the life you actually want

Ready?

Either shoot me a DM or book a time in my featured section

# Your Featured Section: 3 Items, Chosen Carefully

Featured sits directly below your About section — this is where conversions happen.

## ★ Slot 1

### Your Best Content or a Media Mention

- *A LinkedIn Article: "Should You Take Social Security at 62?"*
- *A media feature: "As seen in Financial Planning Magazine"*
- *A video: a 60-second intro or market update*

## Slot 2

### A Direct Booking Link or Lead Magnet

- *"Book a free 15-minute intro call"*
- *"Download our Retirement Readiness Guide"*
- *Link to your website's contact or scheduling page*

## Slot 3

### A Second Piece of Content or an Event

- *Second article targeting a different niche*
- *Recording of a recent client webinar*
- *An upcoming Event with a registration link*



**Joe Marshall**

I exist so tech professionals don't have to stress about money. I plan for them. // Founder @Coastal Capital Advisors



## Featured

Link



### Free Newsletter

2x / month newsletter for  
tech professionals

#### Free Newsletter

<https://mailchi.mp/fd781696f237/TFP-landing-page>

Link



### Free Guide

Financial planning for Procore employees

#### Procore Financial Planning Whitepaper

<https://mailchi.mp/751de6c609df/pro-core-whitepaper>

Link



### Discovery Call

For high-earning tech professionals  
who don't want to stress about money

#### Tech Professional Discovery Call

Calendly

## Featured

Media



### Investopedia Top 100 Financial Advisor

The Investopedia 100 celebrates financial advisors who are making significant contributions to critical conversations about financial literacy, investing strategies, life-stage planning ...

Media



### EMPLOYEE BENEFITS PLANNING Leverage your ...

With over a decade of experience in working with Intel employees and their benefit plans, we can help you understand your options and map out the right strategy for ...

Media



### 5 WAYS TO OPTIMIZE YOUR EMPLOYEE BENEFITS The ...

Are you a Tech employee with various forms of compensation? Our latest guide highlights how you can maximize your compensation from RSUs, ESPPs, Options, and other ...

# Profile Audit: What AI (and Prospects) Are Checking

Profile visibility set to fully public

*Private profiles don't exist to AI or prospects*

Headline: Role | Niche | Location (220 chars)

*The #1 thing AI parses first*

Summary written in first person, plain language

*Avoid jargon — AI and humans both hate it*

Credentials/certifications listed prominently

*CFP®, CFA, ChFC — these are verifiable authority signals*

Awards, media, and speaking listed

*Honors & Awards section + Featured section*

Personalized LinkedIn URL

*linkedin.com/in/[YourName] or [YourNameCFP]*

Profile photo is recent, high-res, professional

*AI doesn't read photos, but humans do — they decide to trust you*

Profile reviewed and updated quarterly

*Stale profiles give AI less to verify*

# Daily, Weekly, Monthly .

The 2 action items that move the needle more than anything.

# The 80/20 Rule

For every

# 1

post you publish...

Engage with

## 5 others first.

## Your Daily Engagement Actions:

- 5 comments on 1st-degree posts
- 5 comments on 2nd/3rd-degree posts
- All responses to your own comments
- 5 DMs (genuine follow-up)



This Takes 15–20 minutes total.

# Why Engage Before You Post?

Most advisors treat LinkedIn like a broadcast channel. That's exactly why they don't grow.

## Algorithm prioritizes reciprocity

LinkedIn shows your content to people you've engaged with first. If you never engage, your posts disappear into the void.

## Native content + engagement = reach multiplier

Posts that keep users on LinkedIn AND generate comments get 3–5x the organic distribution.

## Comments > reactions

A quality comment signals to the algorithm that your content is creating conversations — not just likes.

## Timing is everything

Engage with 5 posts in the 30 minutes BEFORE you publish. You prime the algorithm and warm up your network at the same moment.

# After Engaging, Your Ready For Your Posts To Go Live

Your Weekly Content Playbook. Minimum 3 posts per week. The mix matters as much as the frequency.

## Expertise Post

1

Answer a question your clients ask every week.

*Lead with the punchline. Answer first, explain second.*

*Hook example:*

**"The biggest retirement mistake I see has nothing to do with investments."**

## Conversation Starter

2

Ask something easy to answer. Invite a response.

*Easy questions get comments. Comments fuel the algorithm.*

*Hook example:*

**"Which of these concerns you more right now: inflation or market volatility?"**

## Personal Post

3

Show who you are outside the credential list.

*Personal posts generate 3x the comments. People connect with people.*

*Hook example:*

**"Your kids won't remember the deals you closed."**

# The Weekly Calendar Connection

Remember, you have to be proactive in order to grow your connections.

## Step 1

Every Friday, Go through the last 5 days of your calendar and emails

## Step 2

Copy the person's name or email, look them up via LinkedIn

## Step 3

Invite them to connect on LinkedIn- that's it!

The image shows a LinkedIn search interface. The search bar contains 'Crumling, Kirsten'. Below the search bar, three search results are listed:

- kirsten crumling · 2nd · Project Manager at SEI Inves...
- kirsten crumling · 3rd+ · Student at West Chester U...
- kirsten crumling · 3rd+ · --

A 'See all results' link is visible below the search results. In the background, a LinkedIn profile for 'FMG/SEI Growth Lab partner planning for August campaign' is visible, showing a meeting on Friday, July 1, from 2:00 to 3:00pm. The meeting details include:

- Microsoft Teams Meeting
- 5 guests (1 yes, 4 awaiting)
- Guest list: Samantha Russell, Amy Galli, **Crumling, Kirsten** (highlighted), Karissa Hinton, Susan Theder.

# LinkedIn for AEO: Content AI Cites So Often.

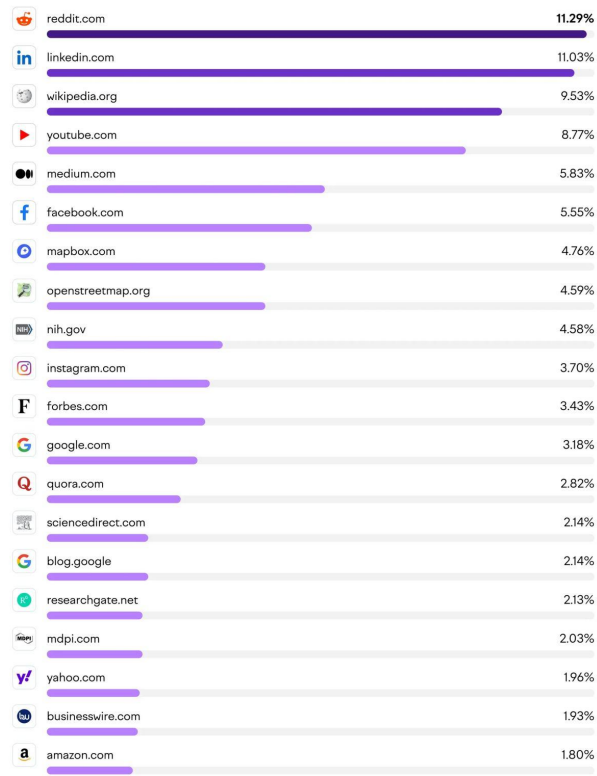
Answer Engine Optimization;  
the competitive advantage 85% of advisors are missing.



# LinkedIn is the 2nd Most Cited Domain by AI

## Top Domains Cited by LLMs (ChatGPT Search, Perplexity, Google AI Mode)

January 2026



Average share of responses with domain citation

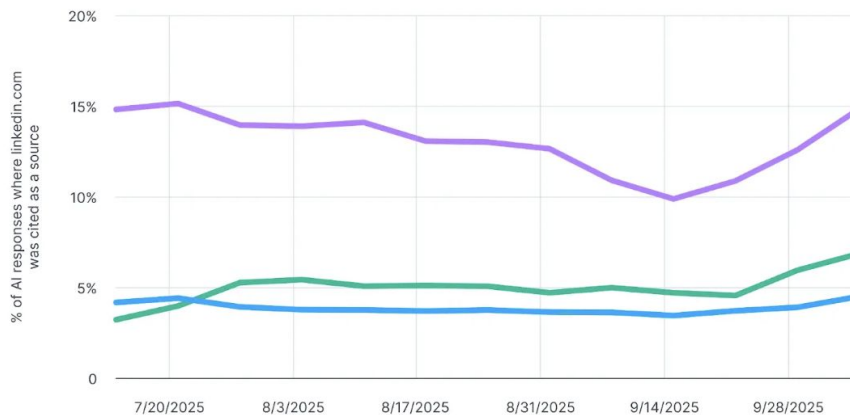
# LinkedIn is the 2nd Most Cited Domain by AI

## LinkedIn: Steady Rise Across All Platforms

### % of AI Responses with a LinkedIn Citation



ChatGPT AI Mode Perplexity



Based on a Semrush study of 230K prompts conducted in October 2025

# Answer Questions In Your Content that AI Is Answering

These are what your prospects are already asking AI search.

When should I take Social Security?

Should I buy or rent a second home in retirement?

What's the difference between a traditional and Roth IRA?

Should I change my portfolio in light of the war in Iran?

How do I know if I have enough saved to retire?

Is a Roth conversion worth it at my age?



**Chris Cooper** · 2nd  
President at Serenity Wealth Management  
4d · 🌐

+ Follow ...

When to claim Social Security.

Your Social Security claiming strategy doesn't just affect you. It could affect your spouse's income for life.

That's why your Social Security claiming strategy is really a component of a broader income strategy for your household.

A few things that surprise people when we walk through the numbers:

- 💡 Max monthly benefit in 2026: \$2,969 at 62 vs. \$5,181 at 70. Same person. Very different income stream.
- 💡 But if you delay, where does that income need come from? Continued work? Your assets? The break-even point falls between age 78 and 81. It's rarely as clean as just waiting.
- 💡 Benefits can be taxable. Up to 85% depending on your income. A new \$6,000 senior deduction helps but it expires in 2028.
- 💡 Divorced? If your marriage lasted 10 years, you've been divorced for 2, and you were unmarried at age 62, you may be able to claim based on your ex's earnings record.

With these variables and more, this decision deserves more than a guess. It deserves a conversation.

[#SocialSecurityStrategy](#) [#ClaimWithConfidence](#)  
[#SerenityWealthNow](#) [#FunWithFinance](#)



# Make Your Content Extractable by AI

How you Structure it is Everything

✗ Will NOT be cited by AI

"Some thoughts on retirement timing..."

This is something I think about a lot with clients and it really depends on so many factors. Everyone's situation is different and you really need to look at the whole picture."

*Vague. No question. No answer. Not extractable.*

✓ AI can extract and cite this

"When should you take Social Security?"

Here are 3 things that actually determine the answer:

1. Your break-even age
2. Your spouse's benefit
3. Whether you're still working

The answer isn't the same for everyone — but it's never random."

*Clear question. Immediate answer. Numbered structure. Citable.*

# Posts and Articles = Both help AI to find you

## LinkedIn POSTS

- Appear in your feed
- Up to 3,000 words
- AI can extract Q&A pairs from well-structured posts
- Lead with a clear question + immediate answer
- Post 3x week

## LinkedIn ARTICLES

- ✓ Their own permanent URL — live on your profile forever
- ✓ Up to 125,000 characters
- ✓ Format the way you would a blog post on your site
- ✓ Use: Question-based title → answer in paragraph 1 → subheadings throughout
- ✓ Post 1x month (repurpose blogs you already have)

# LinkedIn Events

The best lead generation strategy  
that almost no one uses....



fmg

TUESDAY, APRIL 21ST AT 10 AM PT | 1 PM ET



## What's *Actually* Working for **Financial Advisors** on **LinkedIn** Right Now

[Sign Up Now →](#)

SPEAKERS



**Samantha Russell**  
Chief Evangelist  
FMG



**Susan Theder**  
CMO & CXO  
FMG

Today, 7:00 PM

### What's Actually Working for Financial Advisors on LinkedIn Right Now

Event by FMG



Tue, Apr 21, 2026, 7:00 PM - 8:00 PM (your local time) [Add to calendar](#) ▾



Online



[https://info.fmgsuite.com/whats-actually-working-for-financial-advisors-on-linkedin?utm\\_campaign=42072724-FMG-WN-P-What%E2%80%99s%20Working%20on%20LinkedIn%20Wksp%204-21-2026&utm\\_source=linkedin&utm\\_medium=social&utm\\_content=FMG](https://info.fmgsuite.com/whats-actually-working-for-financial-advisors-on-linkedin?utm_campaign=42072724-FMG-WN-P-What%E2%80%99s%20Working%20on%20LinkedIn%20Wksp%204-21-2026&utm_source=linkedin&utm_medium=social&utm_content=FMG)

# How to Use LinkedIn Events

## Tips for LinkedIn Events

- **First, create your webinar on Zoom**
- Create an event for each individual webinar
- You can invite people directly FROM linkedin and they register on LinkedIn too
- Connected to 500 Nike employees? Filter and invite them all
- Still Use Zoom to Host

## Past events



Tue, Nov 5, 2024, 7:30 PM

**Tax-Savvy Diversification Strategies: For Microsoft Employees**



Isaac Presley, CFA and 124 other attendees



Tue, Dec 3, 2024, 9:00 PM

**3 Steps to Understand the Risk & Maximize Your Intel SERPLUS Account**



Isaac Presley, CFA and 20 other attendees



Thu, Mar 21, 2024, 8:00 AM

**Unlocking Tax Savings: Expert Strategies for Intel Employees in 2024**



Isaac Presley, CFA and 12 other attendees



Wed, Mar 20, 2024, 8:00 PM

**Unlocking Tax Savings: Expert Strategies for Nike Employees in 2024**



Isaac Presley, CFA and 12 other attendees



Tue, Mar 19, 2024, 8:00 PM

**Unlocking Tax Savings: Expert Strategies for Microsoft Employees in 2024**



Isaac Presley, CFA and 32 other attendees

# The Best Part: Promote Event without Emails of Prospects

→ **Copy Link** — You can send connection request + link to ANYONE

→ **Invite** — Any admins can send invites directly to their 1st degree connections.

→ **Send in Message** — You can send the invite as a message to any of the admins' connections

The screenshot displays a LinkedIn event page for "What's Actually Working for Financial Advisors on LinkedIn Right Now" by FMG. The event is scheduled for today from 7:00 PM to 8:00 PM and is online. The analytics section shows 8 registrations (up 33.3% last 7 days), 9 event page visits (up 80.0% last 7 days), and a 4.2% engagement rate. A menu is open over the "Event Speakers" section, showing options: Copy link, Invite, Boost, Repost to Feed, Send in Message, X (formerly Twitter), and Facebook. The event network section lists speakers like Susan Theder and Russell.

**Review event best practices**  
Get proven tips to make sure your event runs smoothly from start to finish. [View](#)

**Boost event**  
Reach more people by boosting your event. [Boost](#)

**Analytic highlights**  
Review key performance highlights from your event.

| Registrations            | Event page visits        | Engagement rate |
|--------------------------|--------------------------|-----------------|
| 8<br>▲ 33.3% last 7 days | 9<br>▲ 80.0% last 7 days | 4.2%            |

[Show in-depth analytics →](#)

**Event Speakers**  
Stay connected with your speakers to ensure event success. [✎](#)

**Susan Theder** [📍](#) · 1st  
HealthManagement.com CMO of the Year  
Top 50 Women CMOs of 2025 - Women We  
Want to Watch | ThinkAdvisor  
Member  
Boston, Massachusetts, United States  
Susan and 970 other mutual connections

**Russell** [📍](#)  
How advisors grow & enterprises scale through marketing strategies  
(ask)  
Marketing | Chief Evangelist @ FMG | Follow for daily marketing tips  
Philadelphia, Pennsylvania, United States  
Nadia and 14,330 other mutual connections

[View event network →](#)

[Copy link](#)  
[Invite](#)  
[Boost](#)  
[Repost to Feed](#)  
[Send in Message](#)  
[X, formerly Twitter](#)  
[Facebook](#)

# Live Platform Walk-Through.

Let's Walk Through Some Real Profiles, In Real Time



# Your Website + LinkedIn: Stronger Together

AI authority signals compound when the same information appears in multiple credible places.

## Your Website

- Detailed blog posts on key topics
- Consistent name, credentials & specialty
- Links back to your LinkedIn articles



*cross-linking  
builds authority*

## Your LinkedIn

- Articles that excerpt and link to your site
- Same credentials and specialty visible
- Posts that drive traffic to deeper content

**When AI finds the same name, credentials, and specialty across two credible domains, your authority score multiplies.**

# Your LinkedIn Action Plan — Start Here



## Today

- Fix your headline: Role | Niche | Location
- Make your profile fully public
- Add a booking link CTA under your name



## This Week

- Do the Friday Calendar Routine — send 5 connection requests
- Engage with 10 posts before you publish your first post
- Publish 3 posts: 1 expertise, 1 question, 1 personal story



## This Month

- Write your first LinkedIn Article on a client FAQ
- Structure it: Question title → answer in P1 → subheadings
- Cross-link it from your website

**Remember: Consistency beats brilliance. Show up. Engage. Every week.**

# People Connect With People.



Show your personality. Build your brand.  
Find your fans — and get found by AI.

fmg

Want to keep growing?

**Download your LinkedIn Guide**

Everything covered today, in one doc

**Book a 20-min consultation**

We'll look at your profile together

**Try FMG's Do It For Me**

Content posted, compliance-ready