INSIGHTS

PACIFIC LIFE

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Three Tips for Using LinkedIn to Reach Clients

With over a billion users worldwide,[1] LinkedIn is a surprisingly powerful prospecting tool. With a consumer-focused profile and targeted content strategy, you can use LinkedIn to attract clients and establish meaningful professional relationships.

The United States is home to 250 million LinkedIn users.[1] It is highly probable that a significant portion of these users are actively seeking financial guidance. In fact, 29% of Americans seeking financial advice turn to social media to source it.[2]

For those who are on LinkedIn, helping them find *you* demands a strategic approach to profile optimization and content creation. There are three key areas you can address on LinkedIn to help you cultivate new clients and keep existing clients engaged. Of course, you should first and foremost ensure you are following your firm guidelines for social media.

1. Optimize Your Profile for First Impressions

When potential clients discover you on LinkedIn, they are evaluating your experience, credentials, and areas of expertise. A simple link to your firm's website may not be sufficient. Your profile should be tailored to address their specific needs:

- **Headline:** Clearly state who you serve and the specific financial challenges you solve.
- **About section:** Directly address common financial planning and retirement concerns.
- **Call to action:** Close with a clear, professional next step for them to learn more.

Clients are seeking professionals with deep knowledge of their most pressing concerns, such as lifetime income planning, risk tolerance, and sequence of returns risk. Incorporate specific industry terminology—accompanied by clear explanations—into your profile and content.

2. Develop a Strategic Content Narrative

Your "Featured" and "Activity" sections should reflect a deliberate content strategy rather than a random assortment of posts. Address your target clients' concerns using a clear narrative framework:

- **Surface a problem:** Identify a common pain point or trending economic issue impacting your clients.
- **Educate the reader:** Break down the underlying concepts and explain how they affect individual financial plans.
- **Deepen the insight:** Connect these specific issues to broader macroeconomic trends and core client goals.
- **Invite conversation:** Conclude with a professional prompt or invitation to connect.

3. Align Content with the Consumer Journey

Your audience is at various stages of the decision-making process. Maximize engagement by tailoring content to each stage of the funnel:

- **Top of funnel:** For individuals just realizing they need financial planning, provide informative insights that address common anxieties, such as outliving their retirement savings.
- **Mid-funnel:** For those evaluating their options, demonstrate your expertise through deeper explorations of distribution strategies, income planning, and tax efficiency.
- **Bottom of funnel:** For prospects ready to select a professional, utilize gentle promotional content and clear calls to action.

[1] "LinkedIn Usage and Revenue Statistics," Business of Apps, June 11, 2026.
[2] "New FINRA Foundation Research Examines Shifting Investor Behaviors, Preferences and Attitudes" FINRA, December 4, 2025.

Your content should deliver high-value, educational information. LinkedIn rewards depth and expertise over sheer volume.

LinkedIn Can Help You Build Long-Term Trust

Ultimately, your objective on LinkedIn is to cultivate a reputation as a trusted, knowledgeable voice in the financial sector. You can reinforce your credibility by integrating industry data, citing reliable third-party research, and highlighting your credentials. Sharing insights from recent speaking engagements, continuing education, or industry conferences demonstrates that you are actively engaged in the evolving financial landscape. By consistently delivering value and backing your perspectives with verifiable facts, you transition from being just another profile to becoming a sought-after resource.

ACTIONS YOU CAN TAKE RIGHT NOW

- **Create or update your LinkedIn profile: If you do not have an active profile, create one. If you do, make sure it accurately reflects your current services, credentials, and target demographic.**
- **Work with your firm to maximize the value of your job title.**
- **Determine what educational posts your firm permits.**
- **Following firm guidelines, block out time on your calendar to comment on posts from prospects, peers, and industry leaders.**

Additional Resources and Links

LinkedIn Content Marketing for Financial Advisors: A Guide to Visibility, Credibility, and Lead Generation (Agency 102)

Financial Advisor LinkedIn Marketing: A Complete Guide (Sara Grillo)

How Americans Use Social Media for Financial Advice

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