INSIGHTS

PACIFIC LIFE

RETIREMENT STRATEGIES GROUP | JUNE 2025 RETIREMENT PLANNING

# Creating a Significant Social Presence Can Reinforce Your Value

**Are you showing up online with the innovative and diverse content that showcases your value as a trusted advisor? Your online presence can help clients and prospects understand that you are there to help them with the goal of achieving financial freedom for clients and prospects.**

Helping clients to meet their financial goals starts with building a personal brand that conveys trust, credibility, and leadership. The LinkedIn platform can help you do that. Of course, you should follow guidelines from your broker-dealer/firm when creating social posts.

## Ways to Strengthen Your LinkedIn Presence

LinkedIn is the most-used platform when it comes to financial professionals and social media. In fact, 68% of advisors utilize LinkedIn to market themselves.[1] You can use LinkedIn to communicate expertise, build credibility and trust, and form meaningful relationships. And while client referrals tend to be a faster way to obtain clients, social media is still key for prospecting. You can strengthen your LinkedIn presence using the following three key tactics.

1. **Engage with Purpose.** Be intentional with posts, sharing broker-dealer/firm-approved articles relevant to clients and peers and creating other approved content that encourages interaction, education, and collaboration. Financial professionals who actively engage on LinkedIn are more likely to gain client trust and visibility. In addition, this can lead to prospecting opportunities and solidifying networks with peers and other professionals in the industry. And while using broker-dealer/firm-approved content to educate clients on different products like annuities, life insurance, or other investment products is important, using LinkedIn is a way to educate current and potential clients about you.
2. **Sharing is Caring.** Consider some general (non-identifiable) examples of clients who reached significant milestones with your assistance. According to data from LinkedIn, sharing a real-life scenario results in better engagement. Share and take ownership of success stories—whether it's helping clients retire early, launch businesses, or send children to college. These types of examples highlight the meaningful impact of your service and expertise.
3. **Create Diverse Content.** With approximately four in ten prospects acquired through social platforms becoming an advisor's clients,[1] it is essential to embrace innovation and diversify your content to capture attention and build engagement. Consider:
   - Incorporating video messages to provide pre-approved commentary from experts on current market trends or economic updates.
   - Refreshing your visuals using seasonal branding and leveraging annual holidays as timely opportunities to offer financial check-ins or reconnect with clients.

Just as you counsel retirees on the importance of diversification in their investment portfolios, the same principle applies to your content strategy: Avoid relying on a single format. A well-rounded mix of posts may significantly improve your visibility and influence online.

[1]Financial Advisor Marketing Trend Report, 5th Edition. "Advisor Marketing Landscape," "Growth and Lead Generation," and "Investor Expectations" sections. 2024.

## Now Is the Time to Enhance Your LinkedIn Presence

The Fourth of July is a meaningful time to gather with family and friends and reflect on the enduring values of freedom and independence. It also serves as a reminder of the vital role you play in guiding clients toward financial independence and long-term security. Work with your broker-dealer/firm and be innovative in how you demonstrate your impact, taking a moment to strengthen your online presence and reaffirm your commitment to helping clients achieve their goals.

### ACTIONS YOU CAN TAKE RIGHT NOW

- **Update and optimize your LinkedIn profile.**
- **Share general examples of how you have helped clients gain financial independence and success.**
- **Connect and grow your professional network, and, if possible within your broker-dealer/firm guidelines, collaborate with industry peers on content.**

## Additional Resources and Links

Practice Management "Business Building"

5 LinkedIn Must-Dos for Financial Advisors Getting Started on LinkedIn

**For more information about retirement planning, please contact our Retirement Strategies Group at RSG@PacificLife.com or (800) 722-2333, ext. 3939.**

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