

# 3

## Social Media Tips Financial Professionals Can Use to Gain New Clients



### Make Your Profile Stand Out

Improve your chances of being found when others search for someone like you. Here are some ways to optimize your profile

**John Smith**

Financial Professional & Estate Planner, Retirement & Investment Consultant, Investment Advisor, Wealth Coach

<https://www.social.com/YourName>

Embed keywords

- Financial Professional • Investment Advisor • Retirement Consultant • Estate Planner • Financial Advisor • Tax Advisor • Retirement Investment • Advisor •

Optimize descriptions

Experienced financial professional with more than 20 years of experience in estate planning, tax advising, and wealth consulting for small business owners.

Maximize group memberships

GROUPS

The National Leukemia Foundation... 528 members Join	National Advisors Fou... 9,728 members Join	Midwestern Financial... 6,480 members Join
Penning Alumni Group... 5,215 members Join	Edgartown Chamber... 2,610 members Join	See 10 more >

Complete entire profile

Optimize descriptions

Maximize group memberships



### Ask for Referrals

Referral introductions may increase your chances of connecting with someone new. The Get Introduced feature in LinkedIn helps expedite referrals by giving you the ability to reach out to individuals in your network and request introductions. Here are some rules to follow:

**Always be professional.**



from: **JOHN SMITH**

Dear Jane,

**I'm writing to ask if you would be willing to make an introduction on my behalf.** It looks like you are connected to Thomas Jones, CEO of Morgan Sciences. He and I both attended UCLA, and even though he graduated a few years before me, we know many of the same people. It would be great to connect with another Bruin living in Houston.

**If you are open to making an introduction, I would really appreciate it. However, I would also understand if it is not a good time.** Please let me know your thoughts.

Best regards,  
John

State your intent

Provide a way for the person to say no



### Use a Publishing Platform

Use a publishing platform, such as a blog or LinkedIn's long-form posts, to help publicize your expertise. This allows you to:

Showcase your niche expertise

Be discovered via search engines

Tax Strategies For Small Businesses

**6 Tax Strategies Small-Business Owners May Want to Consider**

SHARE

Amplify your knowledge

**DiscoverSocialSelling.com**



This informational guide is for educational purposes only. Pacific Life is not affiliated with your financial institution. Remember that you must always follow your firm's policies, procedures, and guidelines.

Pacific Life refers to Pacific Life Insurance Company and its affiliates, including Pacific Life & Annuity Company. Insurance products are issued by Pacific Life Insurance Company in all states except New York and in New York by Pacific Life & Annuity Company. Product availability and features may vary by state. Each insurance company is solely responsible for the financial obligations accruing under the products it issues.