

TOOLS FOR RESULTS FOR ELITE WEALTH MANAGERS

LinkedIn Summary Sample



This sample LinkedIn profile summary provides 5 steps to help you develop the most impactful profile summary possible. The goal of your profile summary is to create credibility and trust with your connections. Limit your summary to a maximum of 2,000 characters.

Want more tools to put your success on the fast track?
[Schedule a free consultation](#) with one of CEG Worldwide's experts.

GET STARTED

1 THE FIRST PARAGRAPH SHOULD FOCUS ON YOUR CURRENT ROLE AS A FINANCIAL ADVISOR AND HOW YOU HELP CLIENTS REACH THEIR GOALS.

Joe Smith is a wealth manager at Total Wealth Solutions. He focuses on providing wealth management solutions to attorneys in the San Francisco Bay Area. Together with his partners, he helps affluent clients address their five biggest concerns: preserving their wealth, mitigating taxes, taking care of their heirs, ensuring their assets are not unjustly taken and charitable giving.

2 THE SECOND PARAGRAPH SHOULD DISCUSS YOUR PROCESS AND YOUR SUCCESSES. INCLUDE NUMBERS IF POSSIBLE. AVOID CLIENT TESTIMONIALS.

Joe founded Total Wealth Solutions in 1995 and now serves 200 clients who have entrusted him more than \$500 million in assets. He uses a consultative process to gain a detailed understanding of his clients' deepest values and goals. He then employs customized recommendations designed to address each client's unique needs and goals beyond simply investments.

3 THE THIRD PARAGRAPH SHOULD BE THE VISUAL BREAK THAT DRAWS THE READER'S EYES. FOCUS ON WHY CLIENTS SHOULD WORK WITH YOU.

Successful individuals and families work with Joe to:

- Develop and implement a comprehensive wealth management plan to help them reach their financial dreams.
- Make smarter decisions in today's uncertain political, economic and social environment.
- Obtain an independent second opinion from a top financial advisor in their community.

4 THE FOURTH PARAGRAPH ESTABLISHES YOUR CREDIBILITY. INCLUDE PREVIOUS WORK EXPERIENCE AND ANY AWARDS.

Previously, Joe spent eight years as a financial advisor with Merrill Lynch. He also served as CEO of Guardian Capital Management. Last year, he was recognized as one of the top financial advisors in the San Francisco Bay Area by Barron's.

5 THE LAST PARAGRAPH SHOULD INCLUDE PERSONAL INFORMATION TO HELP BUILD TRUST AND MAKE YOU APPROACHABLE

Joe is a widely recognized leader in the San Francisco financial advisor community, serving on the local CFP board along with other advisory associations. He hosts a weekly radio show on investing and also writes a monthly column for Investment Advisor magazine. He has written three books that have appeared on the Amazon Top 100 list.