



## A Playbook for Success for the Fee-Only Professional

**44% of LinkedIn users take home more than \$75,000**

**Only 2.9% of LinkedIn users are above age 55**

**About 25% of all LinkedIn traffic comes from search engines with only .45% from paid advertisements**

**About 41% of users visit LinkedIn via mobile devices**

**About 41% of millionaires use LinkedIn**

**Individuals Are Seeking Honest Fee-Only Advice**

**Over 90% of Individuals Search The Internet for Independent Advice**

**Competition is Incredibly Intense and Expected to Increase for Many Years**



CFPs..... 93,000  
SEC RIA Firms.....14,500  
CPAs.....650,000  
Attorneys.....1,300,000

As a Fee-Only financial adviser, accountant, or attorney, it is crucial to incorporate LinkedIn into your marketing strategy. However, it is essential to adopt a careful approach that enhances your professional credibility without causing any harm.

This tailored guide for Fee-Only professionals serves as the ultimate resource for leveraging LinkedIn to effectively connect with your target audience and grow your client base.

**LET'S GET STARTED..**

## THE PLAYBOOK

Create Great First Impressions	3
Play the Long Game	8
Engage for Success	11
Comply with the Rules	16





# Create Great First Impressions

# Create Great First Impressions

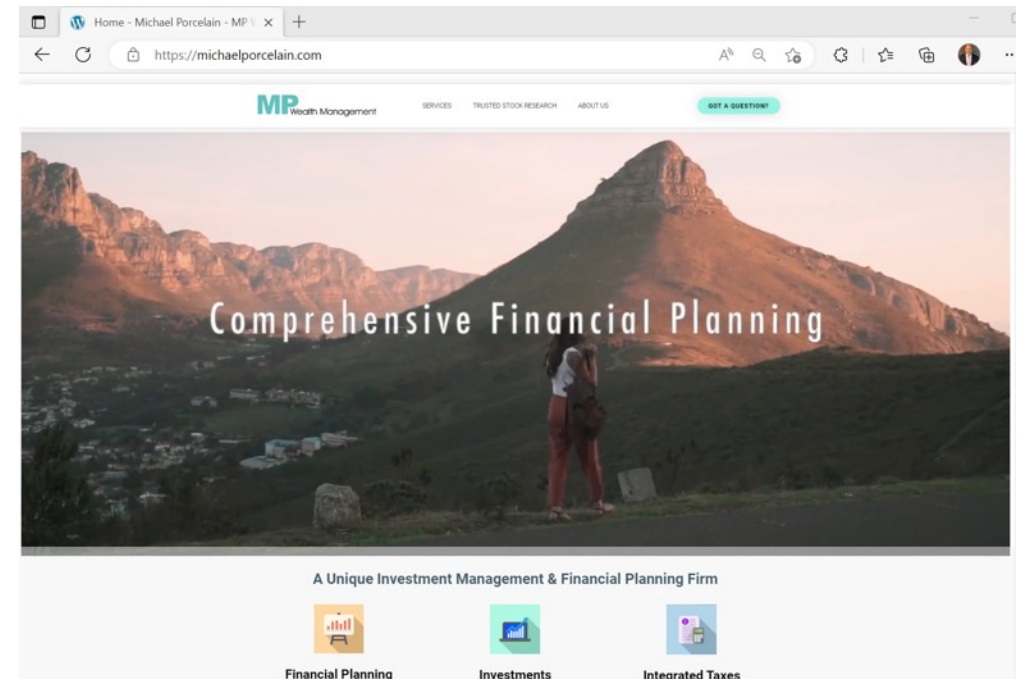
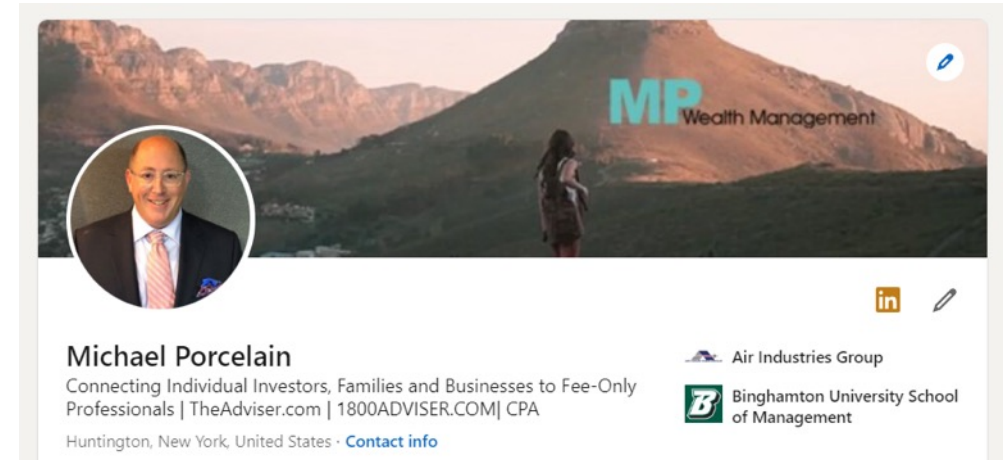
## Modernize Your LinkedIn Picture & Banner

To start with, use an updated high-resolution headshot photo, and consider incorporating a circle frame to add visual interest to your profile picture. Additionally, engage a high-end designer to create a banner that aligns seamlessly with the visual aesthetics of your website, ensuring a cohesive branding experience across your online presence.

**Wear a genuine smile that exudes warmth and approachability to connect with your audience.**



## Example of Cohesive Branding Experience



# Create Great First Impressions

## Edit Your LinkedIn About & Skills Profile

Prospects are not interested in details of every role you've held. Instead, focus on highlighting your experience in providing unbiased and independent financial, tax, or legal advice. By tailoring your profile and skills to address the specific needs and concerns of fee-only clients, you will enhance your credibility and attract prospective clients.

**Showcase your expertise such as retirement planning, taxes and estate planning and emphasize benefits to fee-only clients.**



## Example Profile for a Fee-Only Financial Adviser

Edit about ✕

You can write about your years of experience, industry, or skills. People also talk about their achievements or previous job experiences.

As a fee-only financial adviser, I specialize in providing unbiased financial advice, navigating complex regulations, and delivering transparent and client-centered services. With expertise in retirement planning, investment management, tax strategies, and estate planning, I help my fee-only clients achieve their financial goals with confidence and peace of mind.

365/2,600

### Skills

Show your top skills — add up to 5 skills you want to be known for. They'll also appear in your Skills section.

Certified Public Accounting (CPA) ✕

Financial Planning ✕

Wealth Management Services ✕

Money Management ✕

Trusts ✕

+ Add skill

# Create Great First Impressions

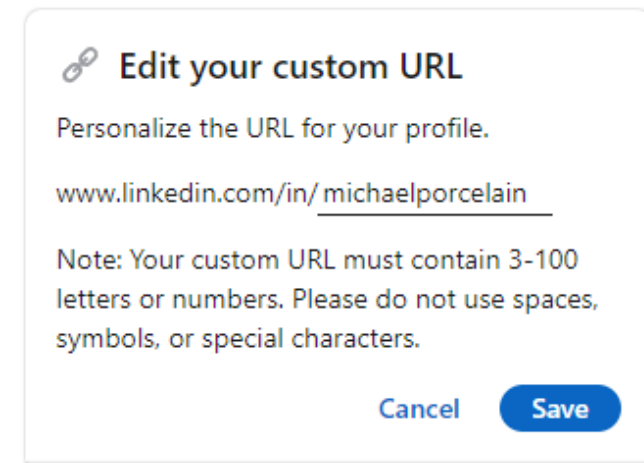
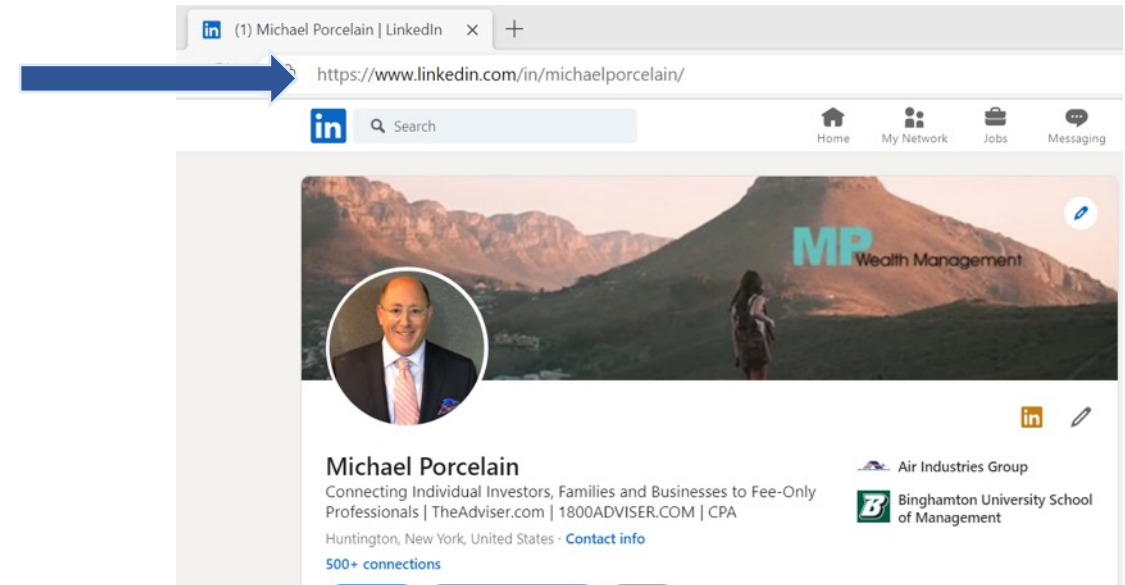
## Personalized your LinkedIn URL

Create a customized LinkedIn URL. Like a regular website address, the LinkedIn URL is usually found in the address field at the upper part of your browser. After you create your LinkedIn profile, LinkedIn automatically generates your URL, which is usually a string of random numbers. To personalize your URL, go to your profile and click “Edit public profile & URL.”

**A personalized LinkedIn URL is like keeping your house clean when company comes over. It’s just the right thing to do.**



## Example of Custom LinkedIn URL





# Play the Long Game



# Play the Long Game

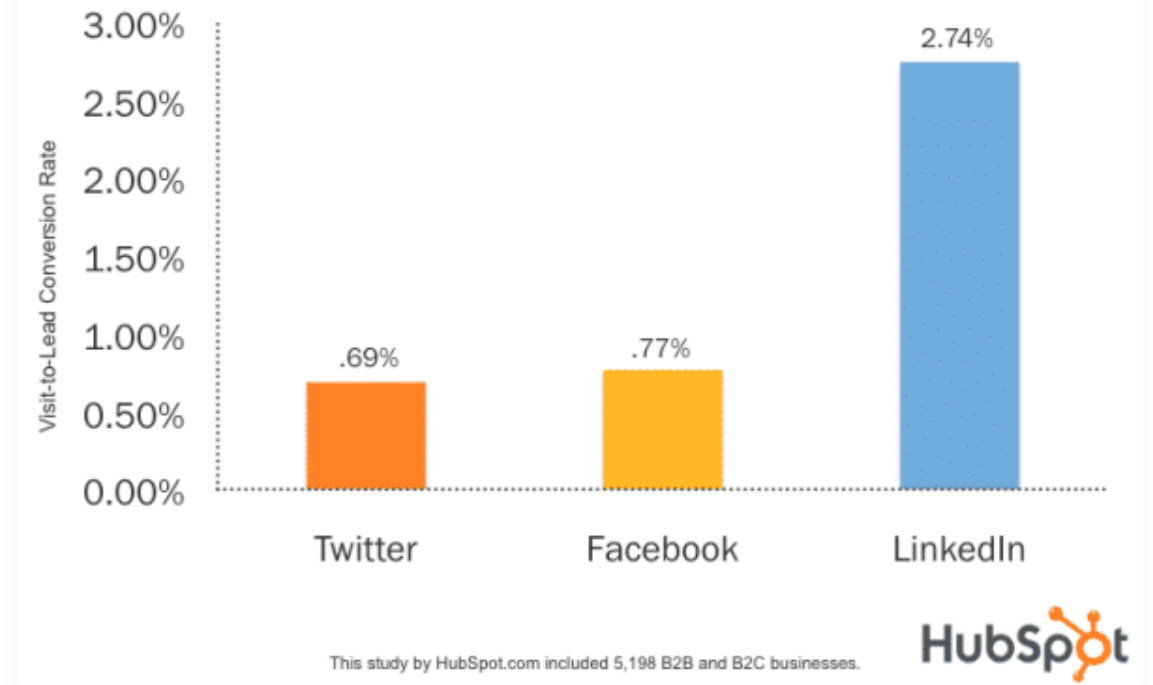
## Have patience – it takes a very long time

Fee-Only professionals should prioritize branding strategies over conversion-focused efforts. With engagement rates below 0.09% and a conversion rate of 2.75%, standard content won't suffice. Instead, invest in a patient and strategic posting approach that focuses on building a strong brand presence. This cost-effective strategy will yield long-term benefits.

**To increase conversion rates, Fee-Only professionals should focus on content that resonates with clients actively seeking advice.**



## Profile of LinkedIn Users



## DEMOGRAPHICS

- **81.7% are under age 34.**
- **15.4% are between 35 to 54.**
- **2.9% above the age of 55.**



# Engage for Success

# Engage for Success

## Avoid Repetitive Automated Posts

While it's essential to nurture professional connections, bombarding them with repeated marketing efforts can lead to annoyance. Avoid automated schedules that post too frequently. Instead, focus on developing a LinkedIn posting strategy that strikes the balance between visibility and avoiding upsetting your network in a thoughtful manner.

**Aim for a strategic approach by posting approximately 1x a month**



## Examples of Annoyed Network



# Engage for Success

## Post Insights Using Third Party Content

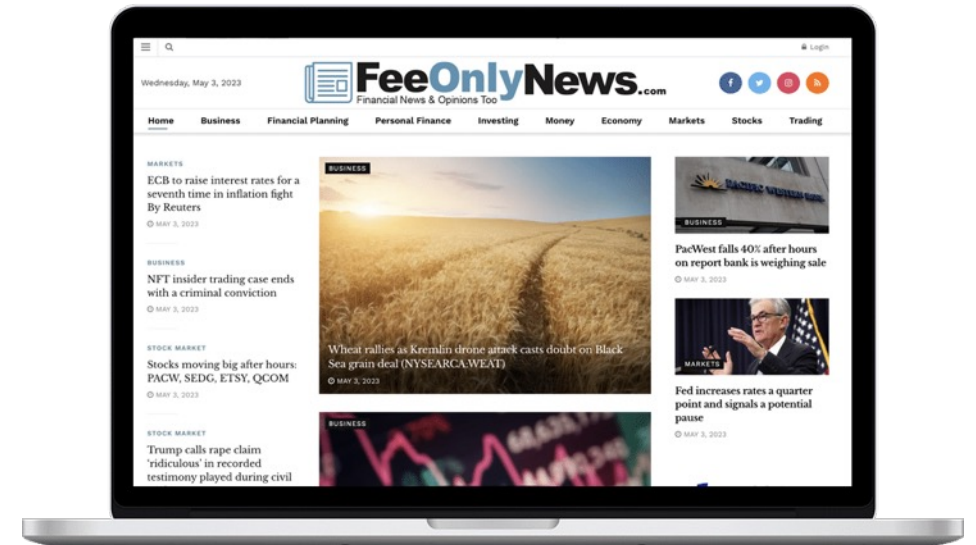
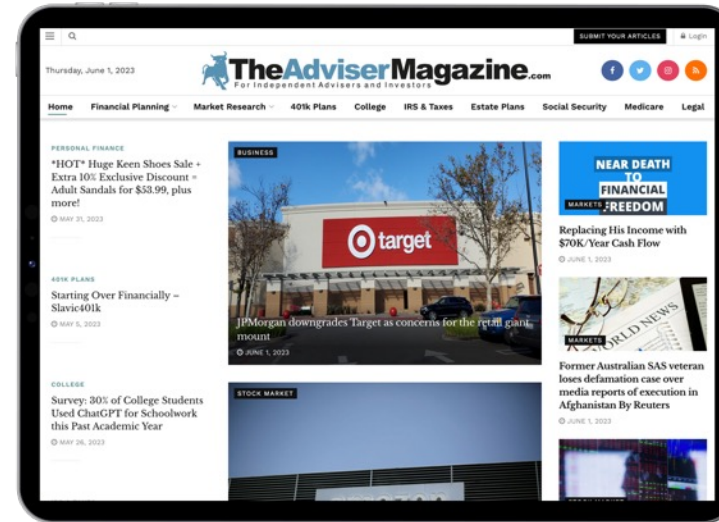
Don't post repetitive content that is already widespread among thousands of advisers, accountants, and attorneys. Differentiate yourself by posting fresh insights and articles from reputable publications such as WSJ.com, Bloomberg.com, and FeeOnlyNews.com. By engaging in thoughtful discussions, you will establish yourself as an authoritative figure in the eyes of potential clients.

**Never post generic comments. Offer fresh and valuable insights that go beyond the usual industry chatter.**



## Example of Reputable Third-Party Publications

# THE WALL STREET JOURNAL.



# Engage for Success

## Post **BRANDED** Fee-Only Content

Avoid generic information. Instead, draw from trusted sources like branded reputable fee-only websites such as 401kPlanAdviser.com and RetirementPlanAdviser.com, as well as authoritative government and industry resources. By avoiding common industry clichés and offering authoritative guidance, you can establish yourself with credibility.

**Comment on other posts is often more valuable than creating your own posts as it allows you to engage in a wider audience.**



## Examples of Branded Fee-Only Content



Medicare.gov



# Engage for Success

## Comment and React to Other Posts

Commenting or posting a "Like" or other appropriate reaction on other posts creates significant benefits. By commenting or expressing appreciation through LinkedIn's built-in reaction symbols, you show support for valuable content. This activity helps build connections and expand your network with other members who resonate with the content.

**To avoid potential conflicts, steer clear of posting or reacting to controversial news and political topics.**



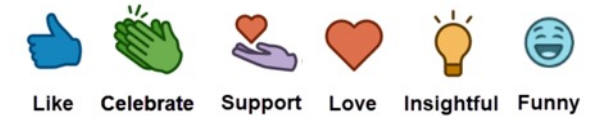
## Examples of LinkedIn "Like" Reactions

**National Association of Personal Financial Advisors** + Follow ...  
6,081 followers  
1d • Edited •

"Even for your wealthier clients, Medicare is perhaps the most important component of their health care planning in retirement."  
...see more



How to Use Medicare Planning to Strengthen Client Relationships | ThinkAdvisor  
thinkadvisor.com • 2 min read  
2



**American Bar Association** + Follow ...  
234,011 followers  
1d •

Waiting to see what the Supreme Court decides in Biden v. Nebraska and Department of Education v. Brown? Check out our student loan resources in the meantime:  
<https://ambar.org/la03a6>



8  
1 comment • 1 repost



# Comply with the Rules

# Comply with the Rules

## **Avoid Hidden Sales Messages – Don't SPAM**

To maintain a strong and credible presence, it is essential to adhere to LinkedIn's policies and guidelines, which explicitly prohibit the posting of SPAM, excessive self-promotion, and promotional content that may be perceived as intrusive or irrelevant to your network. Sharing spam-like content can also significantly damage your professional image and reputation.

**LinkedIn swiftly addresses both known and anonymous complaints, ensuring adherence to its posting policy .**



## **Violations of LinkedIn's Policy**

### **Mass Messaging**

Sending unsolicited, generic messages to many LinkedIn users without establishing a prior connection or personalizing the message.

### **Excessive Self-Promotion**

Constantly posting self-promotional content focuses solely on promoting one's own products, services, or personal agenda.

### **Irrelevant Connections**

Sending connection requests to individuals who have no real connection or relevance to you.

### **Comment Spamming**

Posting repetitive, irrelevant, or generic comments on multiple posts solely to increase visibility or promote personal interests, without adding meaningful insights or engaging in genuine conversation.

### **Content Overload**

Flooding the LinkedIn feed with excessive posts, updates, or shares that overwhelm connections and dilute the quality of content, thereby reducing engagement and interest.



# Comply with the Rules

## Exercise caution and Stay Within Legal Bounds

LinkedIn posts and profiles are considered marketing tools, and as such, they are subject to federal and state marketing regulations, including the guidelines set by bar associations and other relevant regulatory bodies.

Compliance with these regulations ensures adherence to ethical standards in professional communication.

**In addition to complying with the law, exercise common sense when using LinkedIn communications**



## Example of Rules & Common Sense

### **Don't make false or misleading statements**

Do not exaggerate or mispresent qualifications, experience or successes

### **Don't make guarantees or promises**

Investment performance and legal results are uncertain.

### **Client testimonials**

Although legal in certain instances, testimonials on the Internet are less believable and make you less trustworthy.

### **Don't call yourself an expert**

In addition to being illegal for most attorneys, don't self-proclaim yourself to be an expert. Let your professional credentials speak for themselves.

### **Avoid misleading comparisons**

Prospective clients who are conducting due diligence may perceive such comparisons negatively, undermining your image and reputation.

## SUMMARY

**Create Great First Impressions**

**Play the Long Game**

**Engage for Success**

**Comply with the Rules**



**Your LinkedIn strategy should be part of your integrated Fee-Only branding and marketing efforts.**

**Consider partnering with a marketing and design agency that possesses industry expertise to propel your growth.**





## **Are you Ready to Grow?**

Visit [FeeOnlyMarketing.com](https://FeeOnlyMarketing.com)  
and schedule a Free Consultation

This Publication Is Provided With Compliments from Fee-Only Marketing.com  
The #1 Marketing and Design Agency That is Exclusively Focused on Fee-Only Advisers, Accountants and Attorneys.