

Let's Get Social

20 awesome (I think) tips for financial planners from financial planners!



Chew on these stats:

- 67% of high growth advisers say they added new clients as a result of using social media.

	CLIENT AGE			
	AGES 18-44	AGES 45-64	AGES 55-64	AGES 65+
ONLINE SEARCH (e.g. Google)	35%	17%	15%	10%
CHECKED FOR INFORMATION ON PROFESSIONAL NETWORKS (e.g. LinkedIn)	24%	10%	6%	4%
CHECKED FOR INFORMATION ON SOCIAL NETWORKS (e.g. Facebook)	18%	4%	2%	1%

Q: Which, if any, of the following did you do to learn more about your adviser prior to contacting or meeting with him or her?

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Financial Professionals and the Future of Thought Leadership and Social Media

A joint study by:





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Chew on these stats:

IMPORTANCE OF ONLINE PROFILES BY AGE

	AGES 18-44	AGES 45-54	AGES 55-64	AGES 65+
NOT AT ALL/NOT VERY IMPORTANT	27%	47%	50%	51%
NEUTRAL	31%	25%	30%	27%
IMPORTANT/CRITICAL	43%	28%	20%	21%

Q: If you were looking for a new financial adviser today, how important would access to information via social/professional networks be in researching a prospective adviser?

EXPECTATIONS FOR ONLINE PRESENCE BY AGE

	AGES 18-44	AGES 45-54	AGES 55-64	AGES 65+
LINKEDIN	42%	25%	18%	11%
FACEBOOK	25%	11%	5%	6%
TWITTER	22%	5%	4%	4%

Q: How important do you think it is for your adviser to have a presence on the following networks? Shows percentage rating somewhat/very important.



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Chew on these stats:

RELATIVE IMPORTANCE OF MARKETING STRATEGIES

	ALL RESPONDENTS	HIGH GROWTH ADVISER
LEVERAGING MY PROFESSIONAL NETWORK ON LINKEDIN	72%	71%
THOUGHT LEADERSHIP/CONTENT STRATEGY (e.g. blogs, sharing curated content)	66%	70%
LEVERAGING SOCIAL NETWORKS (e.g. Facebook, Twitter)	72%	68%
SOCIAL EVENTS/CLIENT APPRECIATION	59%	66%
PUBLIC RELATIONS	51%	63%
EDUCATIONAL EVENTS (live or webinars)	55%	54%
SPEAKING ENGAGEMENTS	47%	46%
ADVERTISING	24%	29%
DIRECT MAIL/EMAIL	18%	20%

Q: Looking forward in the next three years, how do you think about the relative importance of the strategies you are using today? Shows percentage selecting "Will become more important" for high growth firms.



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LinkedIn 

Chew on these stats:

SOCIAL AND PROFESSIONAL NETWORK USAGE: ADVISERS

USE NOW ■ NOT NOW BUT WILL USE IN THE FUTURE ■

Platform	Use Now	Not Now But Will Use in the Future
LINKEDIN	76%	9%
FACEBOOK	43%	11%
TWITTER	23%	15%

Q: Which, if any, of the following do you use in your personal or professional life today?

SOURCE OF CONTENT SHARED

IT IS PROVIDED BY MY COMPANY	58%
I REPURPOSE PUBLICLY AVAILABLE CONTENT	48%
I WRITE IT MYSELF	45%
IT IS CREATED BY SOMEONE ON MY TEAM	24%
OTHER	3%

Q: What is the source of the content you share?

awesome tip #1



“ Share an update
 Upload a photo
 Publish a post

Actively look for new contacts on social networks.

Share with: Public
Share

awesome tip #2



Compose new Tweet ×

You need to be active – DAILY.

140 Buffer Tweet

awesome tip #3



 Update Status |  Add Photos/Video |  Create Photo Album

 Request connections with people as soon as you schedule a meeting or immediately following.

    Germantown × Friends  Post

awesome tip #4



“ Share an update Upload a photo Publish a post

Join groups of interest on LinkedIn and be active in the discussions that take place.

Share with: Public Share

awesome tip #5



Compose new Tweet

Share really engaging content that “speaks” to your target audience.

140 Buffer Tweet

awesome tip #6



Update Status Add Photos/Video Create Photo Album

Focus on those social channels that interest you, you have the time for, and are where your audience lives.

Germantown × Friends ▾ Post

awesome tip #7

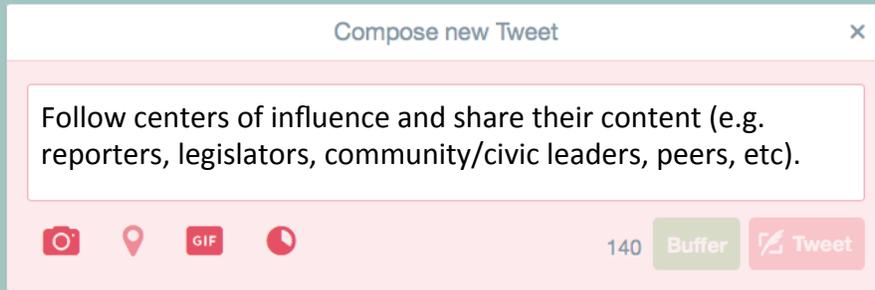


Share an update Upload a photo Publish a post

Just don't "like" what people are sharing. Share it as well!

Share with: Public ▾ Share

awesome tip #8



awesome tip #9



awesome tip #10



“ Share an update Upload a photo Publish a post

Don't just post professional/business content. Make it personal as well.

Share with: Public Share

awesome tip #11



Compose new Tweet

Use a service like Buffer or Hootsuite to manage your accounts all at once.

140 Buffer Tweet

awesome tip #12



Update Status | Add Photos/Video | Create Photo Album

 Focus on the “big three” (Facebook, LinkedIn and Twitter) to start.

📷 👤 😊 📍 Germantown × 👥 Friends 📶 Post

awesome tip #13

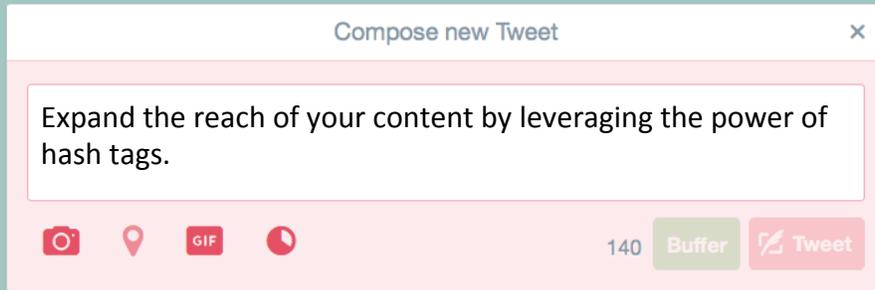


“ Share an update | Upload a photo | Publish a post

Leverage your media appearances and be sure to tag the outlet and reporter.

Share with: Public Share

awesome tip #14



awesome tip #15



awesome tip #16



“ Share an update Upload a photo Publish a post

Leverage your knowledge and creativity to create some new, original content.

Share with: Public Share

awesome tip #17



Compose new Tweet

If you hate it, stop doing it!

140 Buffer Tweet

awesome tip #18



Update Status | Add Photos/Video | Create Photo Album

 Don't get consumed by the number of followers, re-tweets and "likes" you get when starting out!

    Germantown ×  Friends  

awesome tip #19

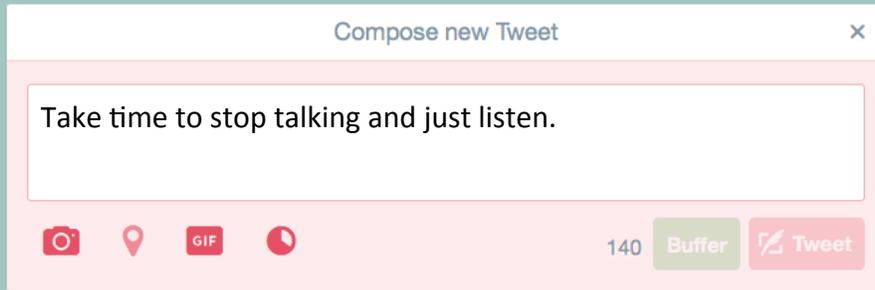


“ Share an update | Upload a photo | Publish a post

Fight the urge to fight back.

Share with: Public  

awesome tip #20



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