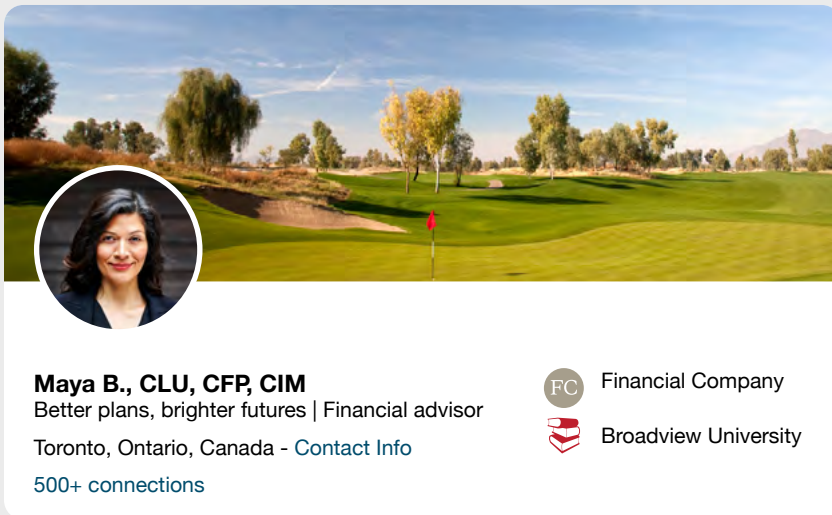


## LinkedIn profile checklist

Use this example and checklist to build an exceptional LinkedIn profile.

*For illustrative purposes only.*



The image shows a LinkedIn profile for Maya B. The background is a scenic view of a golf course with green grass, trees, and a blue sky. In the foreground, there is a circular profile picture of Maya B., a woman with dark hair, wearing a dark top. Below the profile picture, the text reads: **Maya B., CLU, CFP, CIM**, Better plans, brighter futures | Financial advisor, Toronto, Ontario, Canada - [Contact Info](#), and 500+ connections. To the right of the text are two icons: a grey circle with 'FC' for Financial Company and a red and white shield for Broadview University.

### Introduction

Use this section to give a quick snapshot of who you are.

Cover photo that represents your brand or personal interests

Name and credentials (ex: BA, MBA, PMP, CFP, CIM, CLU, CA, CFA) and update your username for a direct way to find your page.

Professional headshot

Headline that describes the work you do

Contact info

### About

Too many parents are so focused on saving for their kids' futures, that they miss out on experiencing life with them today. I create better plans that give them the flexibility to enjoy the present while also providing bright futures for their kids.

When I was young, my parents were thrifty. They taught my siblings and I a lot about the value of money, but we missed out on a lot too. We never went on a family vacation or got to join after school activities. As I got older, I learned it wasn't that we didn't have enough, it was just that my parents were fearful that one day we might not.

Today, my passion is helping parents let go of that burden of worry. A financial plan is about more than saving for the future. It's about making space in the present to make memories with your loved ones and indulge in the hobbies that bring you joy.

### About

This is your personal introduction to visitors to your profile. Describe your brand, then give additional context about who you are and what, why and how you do what you do.

1<sup>st</sup> paragraph: Brand story that describes your why.

1-3 additional paragraphs that round out your brand and connect on a personal level. Consider sharing:

Personal anecdote that further explains your motivation for what you do

Overview of your client engagement process and the solutions you help them with

Description of the client experience you provide

Career experience, achievements, licence and registration jurisdictions

Personal interests, causes, or hobbies

## Featured



My parents made my siblings and I their biggest priority, and that came with big trade-offs. Let me share my story, and how it's shaped the work that I do today. If this resonates with you, send me an email to arrange ...



👍 29 · 2 comments

When your daughter builds a massive Lego tower, you know without a doubt that she's going to be an engineer, but the question is – how will you help her save for university tuition? ...



👍 15 · 2 comments

## Experience



### Financial Advisor

Financial Company

2000 – Present

I create financial plans for families and busy professionals that give them confidence in their ability to enjoy the present while they save for the future. Following our 5 step process, we'll implement a plan unique to your needs and goals.



### Teacher

Midtown Elementary School

1995 – 2000

As an elementary school teacher, I adapted my communication skills to people of all ages – children and their parents. I also saw the direct impact that children's extra-curricular activities had on their success in the classroom, and advocated to increase financial support through my work on the PTA.

## Education



### Broadview University

Bachelor of Education (BEd)

1990-1994

## Licenses & certifications



### Chartered Life Underwriter, CLU®

The Institute for Advanced Financial Education



### CERTIFIED FINANCIAL PLANNER®

Advocis



### Chartered Investment Manager

Canadian Securities Institute (CSI)

## Featured

This is your area to showcase your expertise through highlighting key posts, LinkedIn articles you've written, website links, and media such as videos, photos, or documents. Consider adding key pieces from your client onboarding package that will help prospects feel more informed about you and more likely to reach out. Feature at least one item from this list:

Introductory video

Website link

Recent LinkedIn post, article, or blog you've published

## Experience

Use your past experiences to tell a story of why you're qualified to do what you do today. Draw out key competencies or achievements that relate to your brand.

Experience linked to company page (logo visible),

Description highlights experiences and results related to your work as an advisor.

## Education

Include post-secondary education.

Education linked to institution's company page (logo visible)

## Licenses & certifications

Include all your designations and courses you have completed that are applicable to your role as an advisor.

Licenses & certifications linked to licensing body's company page if possible (logo visible)

## Volunteer experience

Include any volunteer involvements that you wish to share with your audience. This will add a personal element to your brand.

- Linked to organization's company page if possible (logo visible)
- Describe your involvement

## Skills & endorsements

Highlight the skills relevant to your role and your brand. Your network can endorse your skills which strengthens your credibility.

- Highlight key skills and order them appropriately.
- Endorse skills of your referral partners to encourage them to endorse you back.

## Recommendations

Recommendations are credible testimonials of your work. Start with an email or phone request explaining that you're working to improve your presence in the virtual world and would appreciate a recommendation from them on your LinkedIn profile. If they agree, use the LinkedIn function "Ask for a recommendation" to prompt them.


- Ask 5-6 clients, referral partners, or business partners to write a recommendation for you.
- Offer to write recommendations in return.

## Interests

Share your interests by following pages of influencers, companies, groups, or schools that you or clients are affiliated with or admire. Following is also a great way to show support for and keep-up-to date with clients' and COIs' businesses.

- Follow a mix of pages that interest you and relate to your brand and business.
- Invite your network to follow your company's LinkedIn page.
- Participate in groups related to your ideal client profile.

**Volunteer experience**




**Community Volunteer**  
Angel Wing Children's Home  
2010 – Present


Volunteer with the nonprofit Angel Wing Children's Home whose mission is to alleviate children's and families' suffering through times of critical illness.

**Skills & endorsements**

**Financial Planning – 34**




Endorsed by Uday D. and 6 others who are highly skilled at this




Endorsed by Angelina M. and two other mutual connections at this

**Retirement Planning – 28**




Endorsed by Sandra W., CPA and 8 others who are highly skilled at this



Endorsed by Arthur L., CFA (mutual connection)

**Recommendations**

Received (5)      Given (6)




**Arthur L., CFA**  
Vice president  
July 2020, Arthur is a client of Maya's


My wife and I felt a sense of comfort the moment we met with Maya. Her empathy and understanding made it easy to reflect openly on our goals and challenges with her. She helped us build a plan that gives us more freedom to do the things we love than we've ever given ourselves. Most importantly, she's taken the burden off our shoulders. We're both busy, people, so being able to transfer our financial planning into a trusted person's hands has been a blessing.

**Interests**

Companies      Groups      Newsletters      Schools



**The Economist**  
12,862,761 followers



**By Forbes**  
18,282,687 followers