The **SOCIAL** Advisor's Guide to LinkedIn™

- **Create an all-star profile**
- **Build your personal brand**
- **Leverage your network**
- **Target high-quality prospects**
- **Reach new circles of influence**
- **Increase your visibility**
- **Cultivate leads offline**

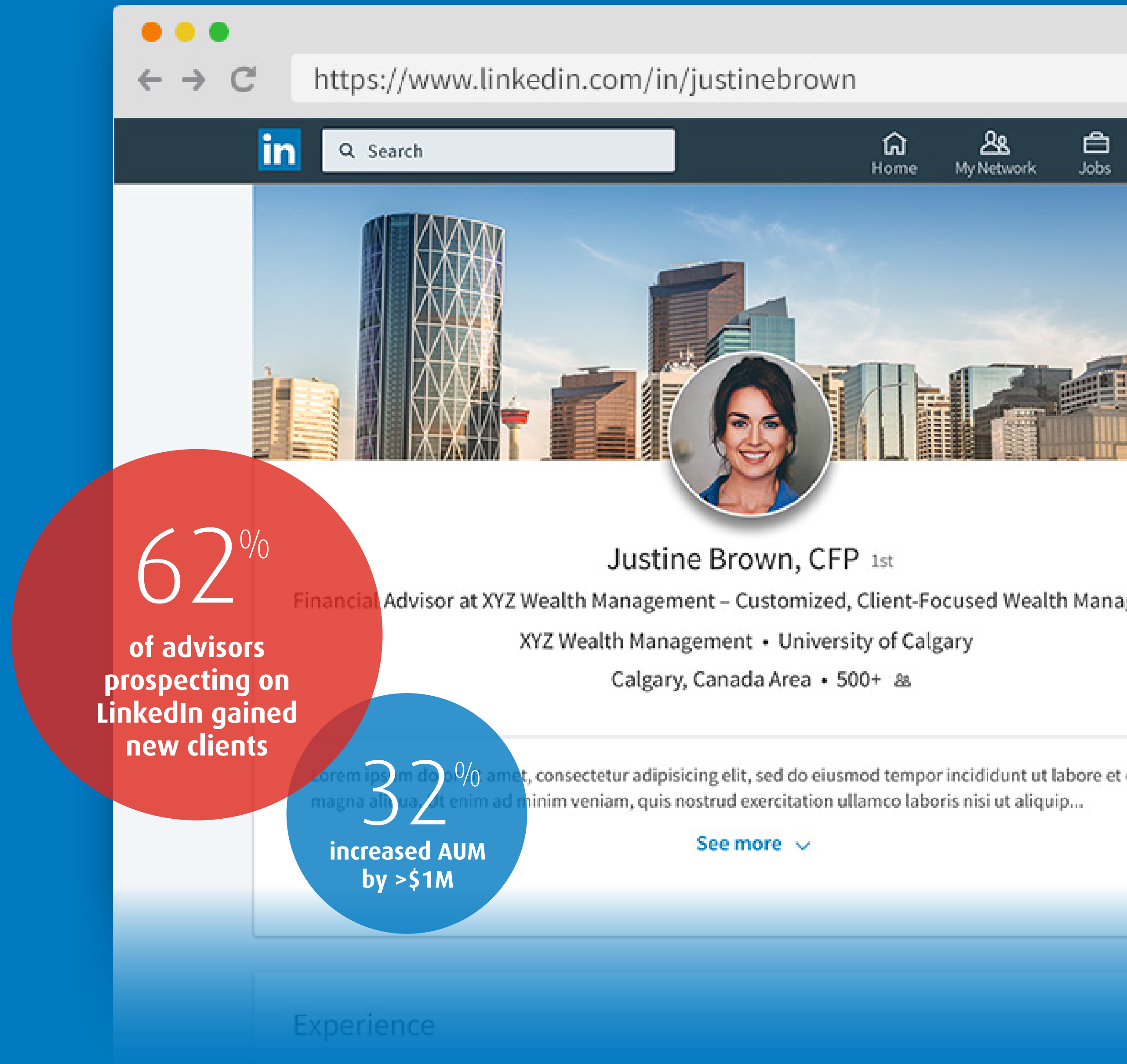


TABLE OF CONTENTS

Ensure that you follow your firm's Social Media Policy, and applicable regulatory guidelines, when using LinkedIn.

TIP #1

Boost your personal and professional brand, target and engage investors, build centres of influence

Top 10 Ways to Create an ALL-STAR LinkedIn Profile

Follow these 10 easy – and effective – steps to reach ALL-STAR profile status-- and remember to keep your content fresh, and consistent with your website and other client-facing materials.

1. Use Professional Photographs – Lever a recent, professional photo of yourself (no group shots), and a personalized background image that best represents your brand. According to LinkedIn, adding a profile photograph garners up to *9x more connection requests.*

2. Write a Compelling Headline – This is at the top of your profile under your name, so make a good first impression by writing a headline that differentiates you from your peers, and includes keywords that prospective clients would use in a search. LinkedIn has a 120-character limit.

3. Create a Vanity URL – Your LinkedIn profile is essentially a web page, with a distinctive, customizable address. The best "vanity URL" contains your first and last name, so it's searchable, and shareable on a business card or email signature.

4. Change Your Privacy Settings – Ensure you're the boss of your own account. Click on the "Me" tab in the top navigation panel to reveal "Settings & Privacy," where you can control how much information you share – and who you share it with. For example: turn on/off activity broadcasts, determine who can see your connections, and select whether or not you're viewing in private mode.

5. Complete Your Summary – Use this bio section as an elevator pitch; an opportunity to showcase your value, services, wealth management style, and key differentiators. This should be written in first person and the tone should reflect you – ensuring it's both friendly and professional. Consider adding your contact information as a call to action for prospective clients and centres of influence.

6. Add Work History and Volunteer Experience – List your current role under "Experience," and at least two past positions to convey your expertise. This isn't simply about job titles, so have your CV handy to communicate your achievements, specialities, and key contributions, making sure to incorporate keywords to improve search engine rankings. *(Consider using LinkedIn's media function that allows you to upload pictures, documents, videos and links.)*

7. Include Skills + Education + Certifications – Don't miss the opportunity to call attention to credentials and proficiencies that will boost your appeal. Check your peers' skill section, and leverage endorsements, to maximize the offering. Adding your educational background info also allows fellow alumni (prospective clients or referral sources) to connect.

8. Get Connected – You'll need at least 50 connections to achieve ALL-STAR status, and LinkedIn has made it as simple as possible: through "Grow Your Network", you can import your email contacts with just a few clicks. (But be selective!) You can also expand your network by requesting personal introductions; and searching Groups/Alumni/Companies/Associations in your area. Don't forget to check out the "People You May Know" feature, which identifies prospective contacts on LinkedIn you already know.

9. Secure Recommendations – By asking for – and publishing – recommendations, you will bolster your credibility, demonstrating the full breadth of your knowledge, expertise and achievements. Remember to seek out those who are able to speak to your skill set with a personalized request.

10. Reflect Your Personal Interests – For more exposure, follow firms/people of interest, and participate in groups/discussions in your area (e.g., professional associations, alumni, volunteer groups and charities). If nothing else, it shows you're a well-rounded individual, and gives readers an insight into your personality.

BMO Global Asset Management

TIP #2

Expand your network, stay top-of-mind and cast a wider net

Grow Your First-Degree Connections

Your LinkedIn network is the most important asset in your online arsenal! The more quality connections you have, the more quality connections you'll be able to make.

First, you'll need to cultivate 1st-degree connections on LinkedIn as a way of staying top-of-mind, and importantly, to cast a wider net and successfully leverage this targeted channel for introductions to prospective clients.

To expand your network ***quickly***, click on Grow Your Network, located on the left of your LinkedIn feed underneath your profile picture then click on the Continue button, to mine for contacts and referral sources from your address book, or browse the "People You May Know" section in the My Network tab – which makes suggestions based on commonalities with other members.

WARNING! Be judicious, and also **de-select** individuals of high value, so you can instead send them a personalized message to connect, rather than the generic invitation.

Deselect All (12) | Skip | Add connections (12)

Jane Smith
Job Title

John Smith
Job Title

What's a 1st-degree connection?

1ST DEGREE = Those you invite – and those whom invite you to LinkedIn™

- Current clients
- Colleagues
- Alumni
- Family/Friends
- Circles of influence (lawyers, accountants, tax specialists, mortgage brokers, club/ association members, etc.)

CONTACT BY:

Clicking **Connect** on the prospective contact's profile page, and then **Add a note** or sending an InMail if you have a "Premium" LinkedIn™ account.

How to craft an invitation to a contact you already know:

1. **Personalize Your Message** – Integrate your skills and niche expertise to resonate with the recipient (e.g., tell a doctor you've been helping other medical professionals with tax planning strategies).
2. **Do Your Research** – Review the recipient's profile before you reach out, so you can reference something personal, whether it's a mutual connection or interest, a recent article they've published, or a career change/milestone. (Take note of the new Highlights feature, which draws attention to commonalities you share with a potential LinkedIn connection).
3. **What's In It for Me?** – People are generally more likely to respond if they can benefit from your interaction, so make sure to ask yourself – and answer – what the recipient will gain.
4. **Get to the Point Quickly** – Be direct and candid about your intentions. It saves time for everyone!

Include a personal message (optional):

Hi Vincent,

I hope you're well! I wanted to take this opportunity to connect with you on LinkedIn.

I often post articles on [retirement savings] that I thought may be of interest.

Looking forward to seeing you at our next meeting, and please don't hesitate to reach out in the meantime.

Best wishes,

John

Cancel | Send invitation

Grow your network and make referrals easy for clients

How to Add LinkedIn to Your Email Signature

Inserting a LinkedIn button into your email signature is a simple, smart – and effective – way to encourage your clients and circles of influence to connect and refer you, while also demonstrating you're an evolutionary Advisor who can adapt with the times. By adding it, you'll enhance your professional brand, and grow your network.

This method of connection comes with a caveat: if you set-up this feature, you'll have to ensure your profile is complete, and *regularly* updated. Follow these easy steps to get started!

1 Find the vanity URL you created for your LinkedIn profile. It is located under your Contact and Personal Info section on the right-hand-side of your profile page, and should look like: linkedin.com/in/yourusername. It also appears on your browser address bar.

2 Go to Outlook and open a new email.

3 Click on the Signature button in the toolbar, then Signatures, and amend your existing signature.

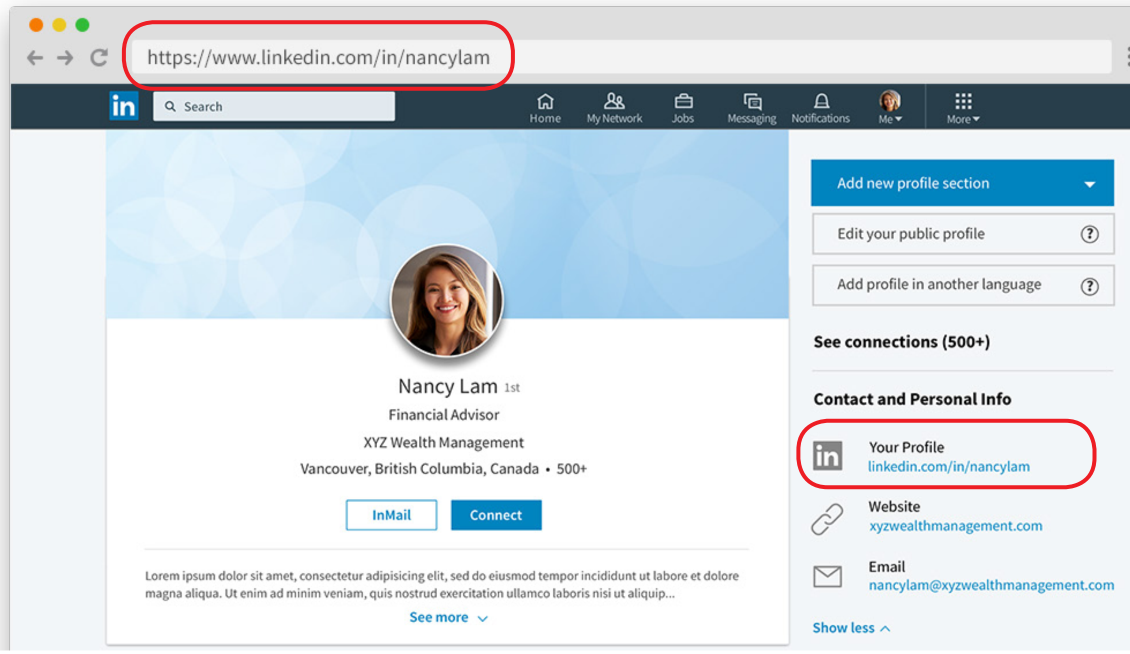
4 Download one of the images on the right, then copy and paste into the signagture box, underneath your contact details.

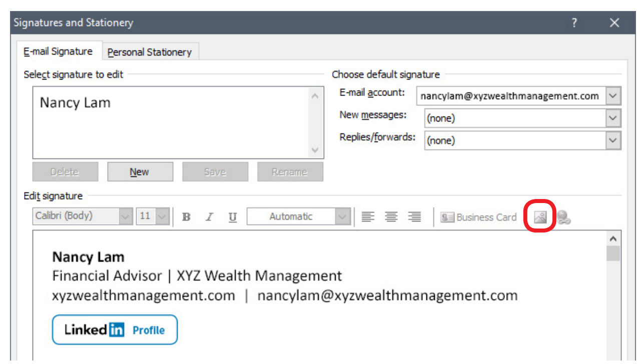
5 Click once on the image to activate it, and then click on the hypertext icon (circled, below right).

6 Copy your LinkedIn vanity URL and paste it into the address box. Click OK.

7 Click OK again and the signature box should disappear.

8 Test the link by creating a new email, and sending it to yourself. When you click on the image button, it should send you directly to your LinkedIn public profile.





BMO Global Asset Management

Prospecting Using LinkedIn's Advanced Search Features

Maximize your prospecting abilities with **up to 10** advanced search filters

Now that you've successfully grown your 1st-degree connections, the next chapter in your growth strategy is to use LinkedIn's advanced Search capabilities to identify prospective clients in your niche, and narrow down possibilities for a *high-quality* introduction, based on an existing connection (consider this a warm lead)! Through this targeted channel, you'll be able to mine, select and pre-qualify your prospects.

To get started, click on the LinkedIn "Search" bar icon at the top of the page, select the "People" filter, and you will see a column entitled, "Filter people by" on the right-hand side.

Within seconds, you can run searches and find leads based on up to 10 parameters!

Connections (1st, 2nd, or 3rd degree) – 2nd-degree connections are the best place to start searching for prospective clients since you already have someone in common

Keywords – Determine what's relevant to your practice (e.g., "business owner," "CEO," "doctor," etc.), or search for phrases, such as "in transition" or "new position," as these individuals may need an Advisor for the first time

Mutual Contacts – Search for the contacts of a specific client, friend, family member, colleague, or anyone in your network

Locations – Use a major metropolitan location to narrow results to your service area

Current Companies – Consider the companies you'd like to target in your area, such as a major enterprise or hospital that employs affluent individuals

Past Companies – Use this search field to trace where former employees of an organization have migrated

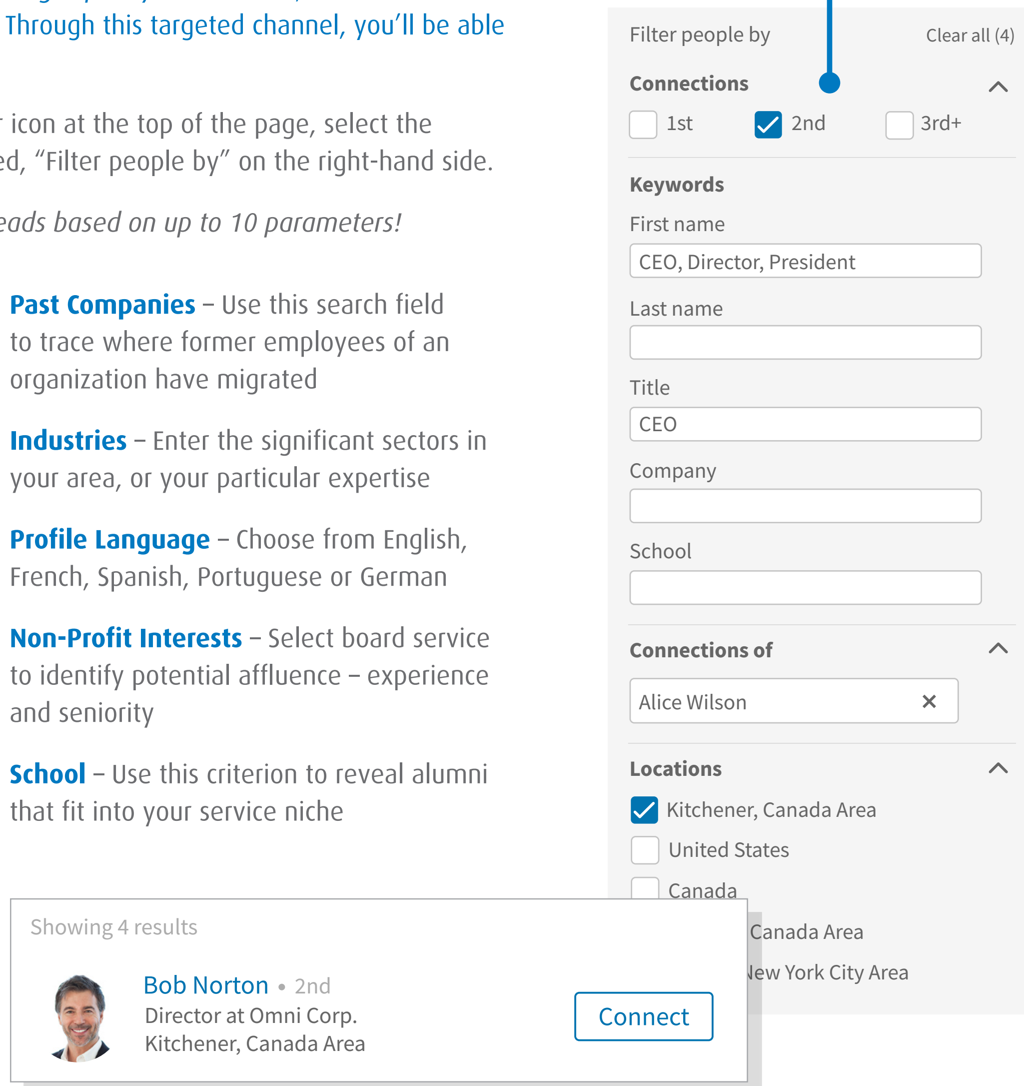
Industries – Enter the significant sectors in your area, or your particular expertise

Profile Language – Choose from English, French, Spanish, Portuguese or German

Non-Profit Interests – Select board service to identify potential affluence – experience and seniority

School – Use this criterion to reveal alumni that fit into your service niche

If your search was too narrow and didn't generate any results, remove filters to update dynamically.



Jessica's practice is located in the hub of Kitchener-Waterloo, so it's a natural fit to leverage this demographic further to build her book, and seek out introductions to doctors, business owners, and associated professionals in her area.

PRO TIP

Selected filters will remain in place for future searches until you deselect them using the "Clear all" button at the top of the filter list, located on the right side.

TIP #5

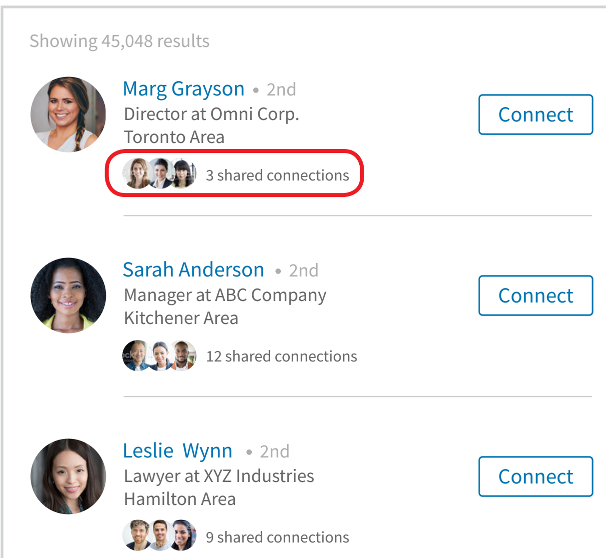
Use Your Connections to Grow Your Client Base

Leveraging Your Network to Access High-Quality Prospects

Now that you've used LinkedIn's advanced search filters to identify those in your niche, you've likely uncovered *high-quality* prospects, based on your 1st-degree connections. As the next step in the networking phase of your LinkedIn growth strategy, send a message to your mutual connections, and ask for an introduction to prospects already familiar with your expertise!

HOW TO REQUEST AN INTRODUCTION

Once you've got your search results, click on the "shared connections" button beneath each prospective client's name, and send a message to a 1st-degree contact, requesting an introduction.



Your request should be professional, brief, and reflect the level of familiarity you have with your 1st-degree connection.

New message ✕

Ed Marion ✕

Hello Ed,

I hope you and your family are well! I notice that you're connected to Marg Grayson. Based on her profile and my service niche, I believe we could build a mutually beneficial business relationship

Would you be amenable to introducing me? If so, I've included a brief note you can forward – and I'd be happy to reciprocate if there's anyone in my network you'd like to connect with!

Best Regards,

John

Write a message or attach a file

Send

Be sure to attach a short note that your existing client can forward to your prospect – with minimal effort required.

Attach by clicking on the paperclip icon in the message box, or include directly within the body of the message.

Hi Marg,

A connection of mine – John Smith of BMO Wealth Management – asked for an introduction on LinkedIn. He's been very helpful with strategic advice and succession planning guidance in the five years we've worked together, and is a skilled professional, and a great resource.

If you're interested in connecting, John's details are below, and if you have any questions about his process or client service ethic, don't hesitate to contact me.

Best wishes,

Ed

John Smith's Contact Details:
Direct: 416-555-3432
johnsmith@bmowealthmanagement.com
linkedin.com/in/johnsmithbmo

BMO Global Asset Management

LinkedIn's Mobile Introductions Feature

To make the networking process as seamless as possible, LinkedIn's Mobile App has an "Introductions" feature, which prompts your shared connections to introduce you to prospective clients with the click of a button.

Get Started! (For iOS and Android phones)

1. Go to the profile of a **2nd-degree connection** (targeted prospect)
2. Scroll down to the **Highlights section**
3. Under **Mutual Connections**, tap **See who can introduce you**
4. Pick a shared connection, and tap the **Message icon** next to their name to send them a request for an introduction
5. Personalize the message to provide context, and tap **Send message**

Search | Filters 2

Message icon

Ed Marion • 2nd
Director at XYZ Company
Toronto, Canada Area

Sarah Anderson • 2nd
Manager at ABC Company
Toronto, Canada Area

Ask for an introduction

Sending Ed a message

Hello Ed,

I hope you and your family are well! I notice that you're connected to Marg Grayson. Based on her profile and my service niche, I believe we could build a mutually beneficial business relationship.

Would you be amenable to introducing me? If so, I've included a brief note you can forward – and I'd be happy to reciprocate if there's anyone in my network you'd like to connect with!

Marg Grayson
Director at Omni Corp.

Send message

Once you've sent your request, your contact will receive a prompt that will allow them to facilitate the introduction by ***clicking on Start Introduction****.*

John Smith would like to meet Marg Grayson

Start Introduction

View Marg's profile

Provide your 1st-degree connection with a brief note to personalize the message, making the process as painless as possible!

Start introduction

Sending Marg and John a message

Hi Marg,

I'd like to introduce you to John Smith, my Investment Advisor at BMO Wealth Management. He's been very helpful with strategic advice and succession planning guidance in the five years we've worked together, and is a skilled professional, and a great resource.

As a successful business owner, I think you could similarly benefit from John's expertise and comprehensive approach. I'll leave it to you both to connect – in the meantime, if you have any questions about his process or client service ethic, don't hesitate to contact me.

Best wishes,

Ed

Marg Grayson
Director at Omni Corp.

Send message

For new insights on how to establish a connection with group members, stay tuned for our next LinkedIn tip – ***Joining – and Leveraging – LinkedIn Groups!***

Position yourself as an expert through Group participation

Joining – and Leveraging – LinkedIn Groups

As an Advisor, joining Groups is another important component of your growth strategy – allowing you to interact with prospective clients and influencers who share a common interest.

Simply clicking the "Ask to Join" button isn't enough. Instead, take advantage of the many benefits LinkedIn Groups offer: position yourself as an expert by sharing valuable content; engage through Messages, Likes, or Comments to cast a wider net; and stay current on a subject matter of interest to your network.

Selecting the Right Groups

START WITH A STRATEGY: Look at your contacts' Groups for ideas of what to join. Their Groups may be a gateway to similar high-value prospective clients in your service niche. You can also click on the "Groups" tab using LinkedIn's Advanced Search capabilities, and enter a topic, keyword, or location – or combine search terms – for more targeted results.

- Geography (Your Town or Region)
- Search Terms (Executives, Doctors, Lawyers, Accountants, Entrepreneurs, etc.)
- Income Bracket (Golf Clubs, Tennis Clubs, Rotary Clubs, Art Galleries, Charities, etc.)

PRO TIP

Search Groups that are LOCAL to build your business! If the next step after a virtual connection is an in-person meeting, geography is an important factor.

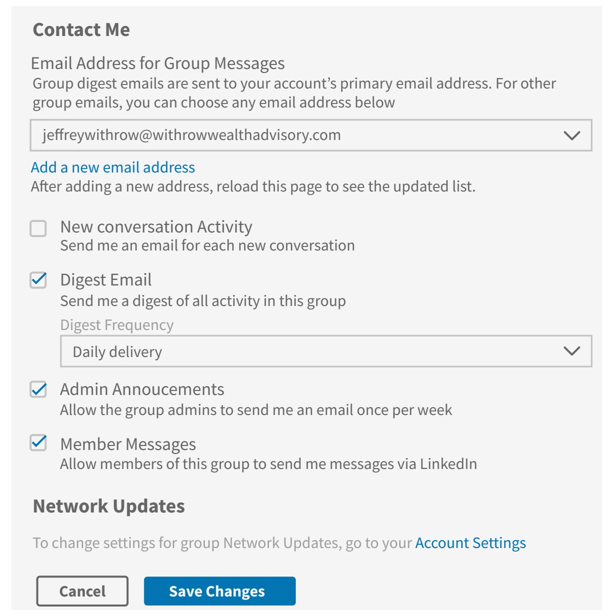
Now that you've joined a Group, participation is the crucial next step. Many successful social Advisors post thought-provoking questions, creating an opportunity for interaction and a vehicle to showcase your wealth management expertise.

HOW TO ENGAGE

1. Join conversations – contributing to a running discussion is a meaningful way to gain exposure, as LinkedIn sends comments via email to those following the conversation, which could be hundreds – or thousands – of people.
2. Post relevant articles, discussion topics, or your own public engagements, whitepapers, etc. – sharing posts that are topical and valuable to Group members helps to build your brand
3. Ask for recommendations in your service niche – everyone is looking for connections, so having them on hand will increase your value-add for existing, and prospective, clients

A client is looking for a best-in-class cloud-based solution for his medical practice. Would love to connect him to an Electronic Medical Record (EMR) solutions expert. Have any recommendations?

For every group you join, you can customize your settings (by clicking the appropriate icon ⚙) to receive a digest email of all activities, or a notification for every new conversation and admin announcement. You can also choose to allow whether members can send you a message via LinkedIn.



TIP #7

Showcase your brand using a custom background image

Adding a Background Image to Your Profile

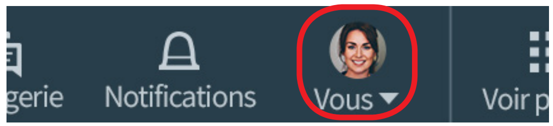
LinkedIn's custom background image is yet another way to make your profile stand out from the crowd in an increasingly competitive environment. Taking up a large chunk of your profile's premium real estate, it's an ideal space to make a meaningful – and memorable – first impression.

Use a professional photo that evokes your brand – whether it's a city skyline, a business logo, an office building, or a powerful statement about the value you offer investors. Ultimately, the goal is to give prospective clients a clear sense of what you're about before they scroll down any further.

Optimizing Your LinkedIn Background

- **Follow the Requirements** – The image file must be a JPG, PNG, or GIF, and no larger than 8 MB, with dimensions of 1584 (w) x 396 (h) pixels. Not adhering to the guidelines will result in blurry or pixelated photos. Images with larger file sizes typically look better, so get as close to the maximum size as you can. Having difficulty finding an image? Several websites offer LinkedIn backgrounds free of charge for your inspiration.
- **Check the Results** – Even when using the correct dimensions, it's wise to consider where the image and the text are situated, since the middle of the photo is laid out behind your LinkedIn profile. As soon as you upload, you can click and drag the photo to reposition it, zoom in, straighten or rotate, crop, filter, and adjust the brightness/contrast to ensure the optimal image for your profile.
- **Use a Third-Party Application** – To help with design and give your photo a professional touch, web-based tools such as Canva, GIMP or Pixlr, which can create images with custom dimensions, will save you valuable time.

How to Upload Your Photo:



1 Click the **Me** icon at the top of your LinkedIn homepage.

2 Click **View profile**.

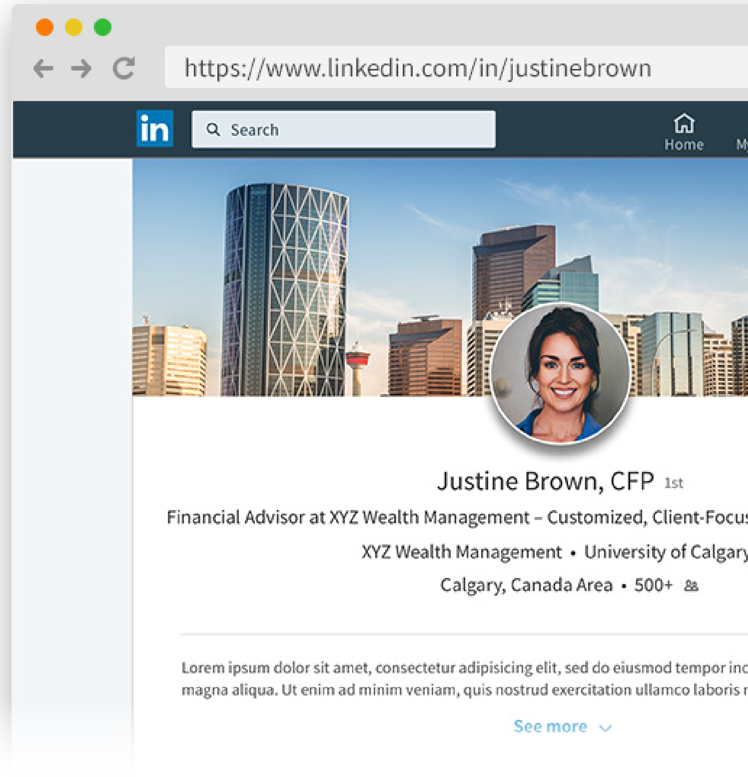
3 Click the **Pencil Edit** icon at the top of your profile in the right hand corner.

4 Select an image from your computer to upload and click **Open**.

5 Click Save.

PRO TIP

If, after following LinkedIn's requirements, your image is still pixelated, run it through a compression tool such as Trimage for Windows, or ImageOptim for Mac before uploading.



LinkedIn profiles with photos get 21 times more profile views*

* LinkedIn, LinkedIn by the Numbers: 2017 Statistics. April 5, 2017.

Engage – and build your voice

Increasing Your Visibility

You've grown your primary network, and joined relevant Groups to enhance your visibility. Now, it's time to engage, and start leveraging LinkedIn to promote your brand and build your practice. Writing your insights, or simply sharing an interesting update can provide a gateway to meaningful conversations – and connections.

Engagement comes in MANY forms:

- Write a status update or article
- Share news, a video or market commentary
- Like or comment on a posting, or company status
- Leverage your current (and compliant) blog
- Post content from your professional website
- Disseminate thought leadership from your firm
- Initiate or comment on conversations in your Group forums

By commenting or even liking a post, you gain exposure to people outside your network, while allowing your contacts to get a sense of what you find relevant, interesting or unique.

How to Get the Most from Your Posts

Determine topics of interest to your audience – and post when timely. For example, share tax tips in March/April, or RESP considerations in August/September. It doesn't have to be investment-related – just helpful – so think about your network carefully. To make it easier, you can now access the Audience Insights feature on desktop and mobile, allowing you to quickly glean who's viewing your updates, including breakdowns of companies/job titles.

Expand the conversation. If someone comments on your content, engage with them through a response, or a "Like." Comments are a great way to extend the reach of your posts and enhance your visibility. It's important to manage your comments though, and foster a productive discussion. LinkedIn now gives you the ability to disable comments on your posts and articles, should the conversation get sidelined.

Update content regularly. Create a schedule and make a conscious effort to post at least one article per week.

Connect! Monitor the likes and comments on your LinkedIn contributions and use them to grow your network further.

Ensure ALL your content on LinkedIn is relevant, not overtly promotional and – ideally – frequent enough for you to stay top-of-mind!

How to Get the Most from Your Posts (cont'd)

Stay local. Post content that applies to your niche community. Follow local newspapers, blogs, Groups, and major employers – all important sources of content and connection.

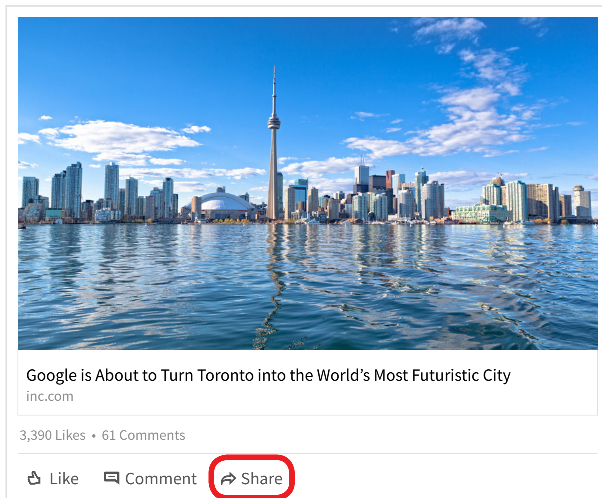
Cross-promote. If you have accounts on other social networks, or you're already distributing a newsletter, or you have a business website, cross-post this content on LinkedIn and vice versa. LinkedIn now allows you to grab the URL of your post from the control menu, and share with your network on Facebook, Twitter, or anywhere on the web.

Add photos or video. Use images and/or video to draw more views to your posts and engage your network. For iOS users, multiple photos can now be added within a single post – for example, posting highlights from a conference you attended, or a charity event. You can also upload a video resource by clicking on [Video] on your desktop, or even record an event live and post through your LinkedIn mobile app.

Share a draft of your article before you publish. Before you post on LinkedIn, you can now receive feedback on your articles from colleagues, friends or family members – helping you to position yourself as an expert by posting valuable, accurate and timely content. Click on "Share Draft" in the article edit menu to get a link that you can send to select contacts for review.

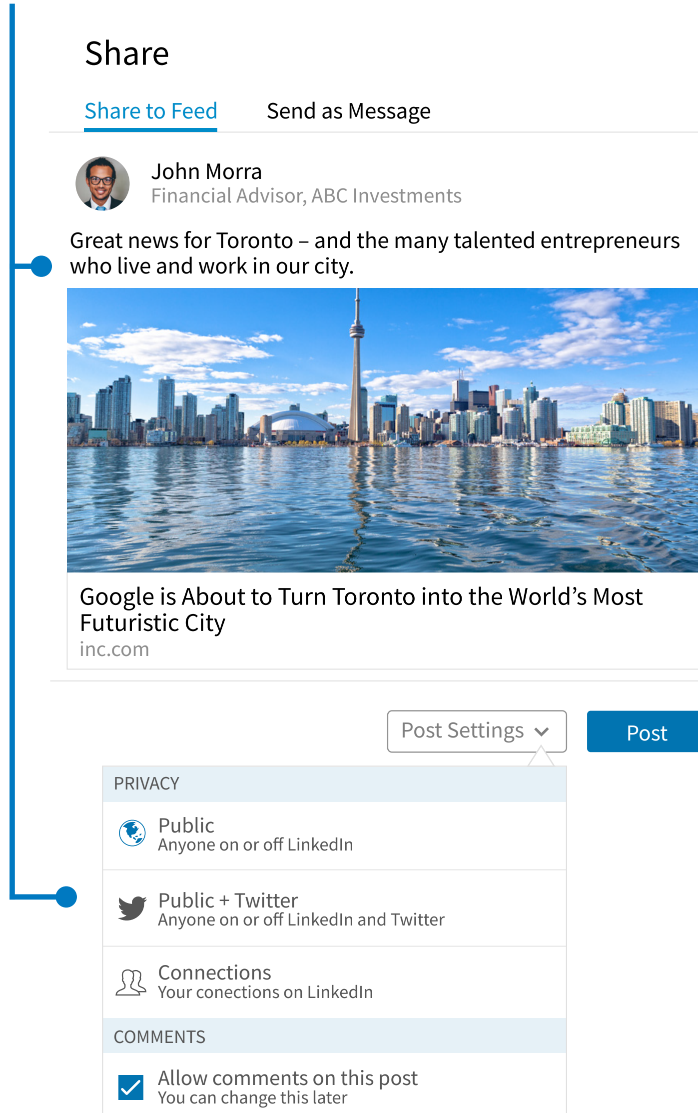
PRO TIP

For an effective article share, write an insightful introduction that's helpful to readers – demonstrating your value to existing and prospective clients. You can also mention specific contacts to target your audience.



Here, John shares an article that's relevant to his client base in Toronto.

LinkedIn allows you to customize an introduction to an article, and post it to the public, or to individual connections.

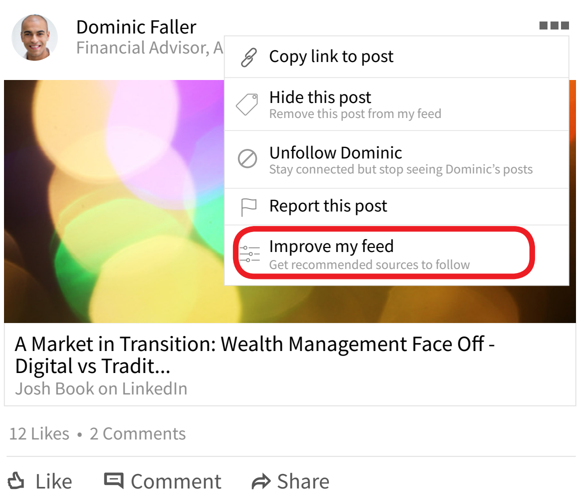


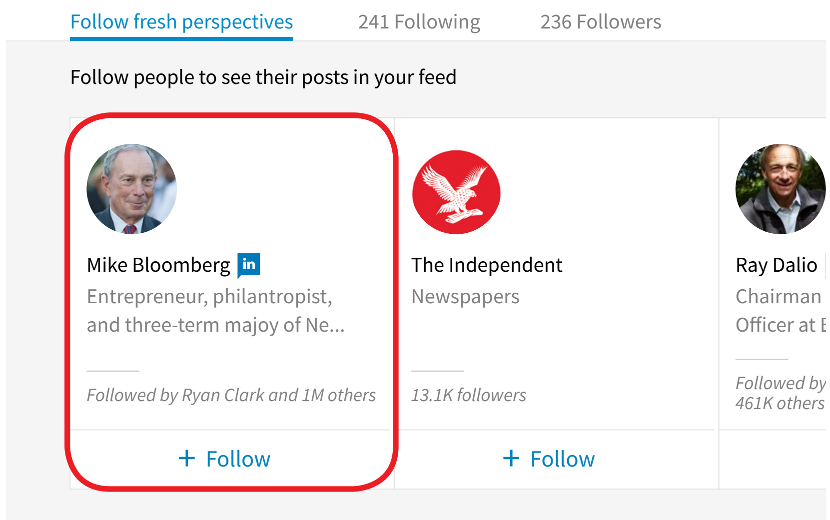
Personalize your newsfeed and build a valuable, interactive platform

Getting Maximum Value from Your LinkedIn Feed

As a social Advisor, your LinkedIn newsfeed should be a source of engagement and interaction – designed to generate topics of interest to you – and your clients. Whether it's wealth-management-related articles, new thought leaders, or current events targeted to your niche (e.g., lawyers, doctors, entrepreneurs, etc.), accessing the diverse views shared on LinkedIn – and creating a personalized feed you can curate – has never been easier.

By clicking "**Improve My Feed**" on the top right corner of any post in your newsfeed, you can browse *recommended sources* to follow based on your Interests, Groups and Network, including key industry influencers, companies, and news outlets – allowing you to gain new insights; discover valuable content; generate conversations across networks; and share articles from the top publishers of your choice. Once you click "Done," your selected sources will appear directly in your feed, establishing the ideal forum for you to disseminate information.





If you don't want to commit to following, you can also use the "**What People Are Talking About Now**" feature on your LinkedIn home page to access curated interest-based feeds, highlighting the most pertinent stories based on your area of expertise.

Make Your Feed Work for YOU:

Choose Top Recommended vs. Recent – giving you more choice over the way in which you consume content, and stay informed, with the ability to toggle between, and sort by, both options at the top right hand side of your personal feed.

Customize Notifications – based on what you find the most valuable – for example, work anniversaries, birthdays, promotions, job transitions, changes in location, awards, etc. Click on Settings & Privacy, and make your selections for Notifications under the Communications tab.

Unfollow People or Companies – skip the updates of specific connections without notifying them by clicking "Unfollow" under the "...More" menu on their individual posts – keeping your relationships intact.

Manage Comments – with the option to disable or enable comments on articles you post, you have the ability to control the types of conversations you have, prior to, or after, you publish.

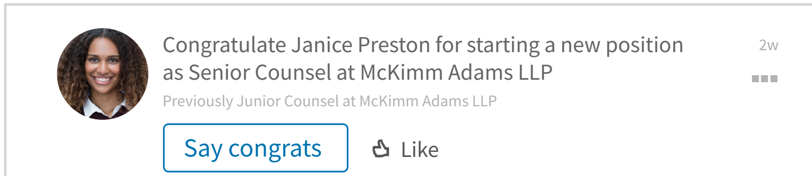
TIP #10

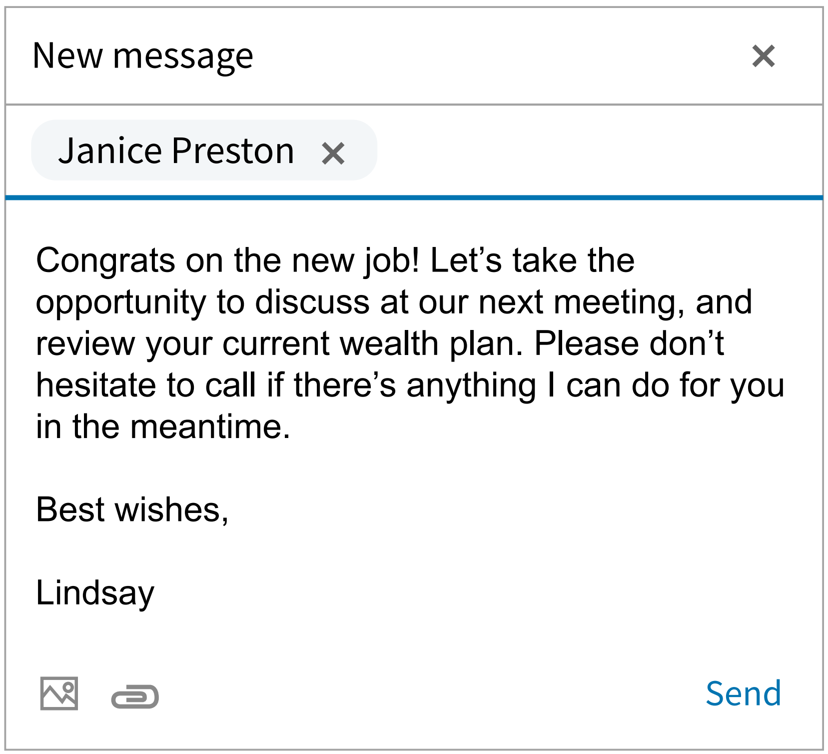
The ultimate long-term goal: Build on your leads *offline*

Taking Your Relationships Offline

You've created a winning profile – and now you've begun to build your brand by establishing and growing your network of clients, prospects, colleagues and circles of influence. Take the next logical step and cultivate your leads **offline**:

- Use LinkedIn Messaging, Notifications, and Reminders to stay current on your clients' offline activities and developments in their professional lives (e.g., a new job is the ideal opportunity to suggest an in-person meeting to review a client's wealth plan)
- Monitor local Group discussions for relevant event or meeting announcements, and invite fellow members to attend
- Invite select LinkedIn connections to offline events that you – or your branch office – is hosting (e.g., with a keynote speaker of interest to your affluent clientele)
- Browse through your primary network, and ask for introductions to people you'd like to meet
- Sync your calendar to the LinkedIn mobile app to receive notifications about who you're meeting with next, with the ability to connect if not already in your network
- Change your notification settings to generate follow-up reminders after your meetings





LinkedIn Premium

Both Sales Navigator and Premium Business accounts allow for advanced search filters, lead generation, messaging privileges, sales and business insights, and unlimited people browsing. If you're considering a switch to a Premium plan, LinkedIn allows you to explore the features for a month, free-of-charge.

- **12 million+ Canadians are registered LinkedIn users**
- **Rate of professionals signing up? More than 2 per second**
- **5M+ high-net-worth investors use social wmedia to help with financial decisions**

Sources: LinkedIn, LinkedIn/Cogent Research.

AT **BMO GLOBAL ASSET MANAGEMENT**, our commitment to help you build your business extends beyond a breadth of outcome-oriented investment solutions and best-in-class service, to innovative practice management ideas designed to differentiate you.

ADDITIONAL RESOURCES

LinkedIn Help Centre
help.linkedin.com (pose a question)

Official LinkedIn Blog
blog.linkedin.com

LinkedIn Practice Management Articles
bmogamadvisor.com (our monthly Insights e-Newsletter)

LinkedIn Apps
linkedin.com/mobile (an overview of the LinkedIn application suite for mobile devices)

BMO Global Asset Management