



PLAYBOOK FOR
SOCIAL
Media

Getting Started with Social Media





Social Media for Financial Professionals

As social networks take an increasingly important role in people's lives, more and more financial representatives are considering how to incorporate these tools into their business. The reach and influence of social media can help you engage with clients and attract new ones in far reaching and cost-effective ways. But with limited time and resources, in order to maximize your social media efforts, you'll need to start with a plan.

Getting Started

Your Social Media plan needs to be targeted, efficient and easy to implement. Keep in mind these practices and consider the various social media tools available.

Social Media suggested practices include these activities:

- Update** Keep contact info up-to-date and post regularly
- Share** Tout what your office has accomplished and what you can offer clients. Content drives social media so sharing relevant content is an expectation from those in your networks.
- Listen** Find out what your followers are interested in learning about. Follow influencers and new organizations to get a feel for trending topics. Use social media to monitor job changes, birthdays, and other life events. Listening may also help you proactively answer clients' questions.
- Connect** Social media is all about making connections and building networks. The higher the quality of your network, the more productive your interactions will be.
- Engage** Make your posts interactive and become part of the conversation.



TOOLS



LinkedIn

LinkedIn is a business networking site that allows you to expand your network via “warm introductions.”

- Your LinkedIn Profile is usually the top online search result for your name
- Financial representatives who prospected on LinkedIn achieved a 76% success rate (Putnam Investments/FTI Consulting, 2013)

Tip: Join industry groups, college alumni groups and other affinity groups—these connections can lead to valuable prospects.



Facebook

Facebook connects individuals and businesses who share status updates, stories, photos and videos.

- Facebook’s scale cannot be ignored: 1.55* billion active users per month
- Most users check Facebook 3 to 4 times daily; mobile users check it 14 times a day

Tip: Consider your personal and professional appearances on Facebook. You may want to set up a separate business page for clients and prospects.



Twitter

Twitter is a micro-blogging site that allows 140 character updates and comments.

- Most users read tweets on mobile devices
- Conversations are quick, accessible, and transparent
- 500 million tweets are sent daily

Tip: Install the Twitter app on your smart-phone and follow the “river of news” in real-time to gain an understanding of market-moving events.

RSS Feeds

Sign up for blog feeds or email updates from independent bloggers, companies and news sources that you read on a regular basis, either for business or pleasure. These are great sources for articles and bits of shareable information. The feeds can come directly to your Google or Yahoo! Homepage, delivered via email, or you can use a tablet app like Flipboard to read them magazine style.

YouTube

Now the second largest search engine after Google, YouTube contains a variety of videos on everything from how-to and news related videos to the latest up-and-coming musicians. The posted videos can be shared easily on your Facebook page and allows for your commentary as well. Consider videotaping your next group presentation, posting it to YouTube and then reposting it to Facebook. Make sure you obtain approval from your compliance department beforehand.

SlideShare

Use this to share and view compliance-approved presentations and documents. Search the site for presentation ideas, investment information and company overviews. Some asset managers even share client seminars on SlideShare for financial representatives to use with clients.

BE AWARE

Learn about your firm’s social media compliance policy and any other regulations, such as FINRA and state insurance advertising regulations, that may affect you in your role as a Financial Professional. Incorporate these guidelines into all of your social media activities. Many firms require that your social media activity be monitored or approved in advance. It is imperative that you know your firm’s policies and ensure compliance with them to help avoid potential issues with the firm or regulators.

*Facebook, September 2015

Making the Most of Your Social Media Plan

By breaking down your plan, it can help you to stay current and maximize the impact of your social media marketing efforts. Consider following these tactics:

DAILY TO-DOS

LISTEN

-  **Check** your email for social network notifications
-  **Browse** LinkedIn network updates for news, trends, and professional activities
-  **Monitor** job changes, birthdays, and other life events
-  **Scan** Twitter for news as it happens

USE TOOLS TO STAY WIRED

Manage your presence and monitor conversations across multiple networks with social media management tools like Hootsuite, TweetDeck, or Sprout Social.

ACT

-  **Accept** LinkedIn requests to connect or Facebook friend requests
-  **Respond** to any direct messages
-  **Follow up** on career or life milestones in your network—online and offline

THE SOCIAL REP

The typical financial professional who uses social media



Putnam Investments Survey of Financial Advisors' Use of Social Media (2014).



WEEKLY ASSIGNMENTS

CONNECT



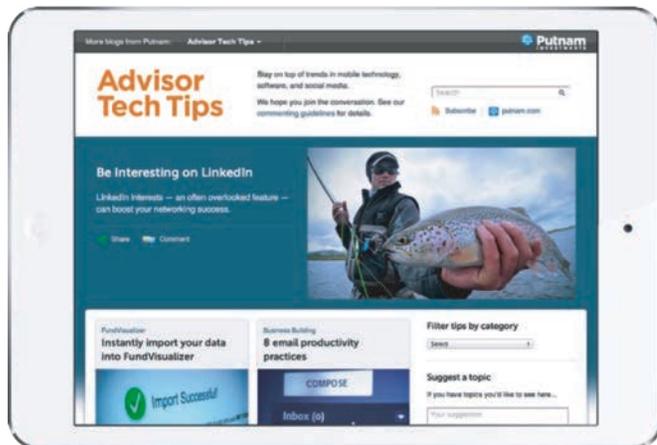
Use LinkedIn's "People You May Know" feature to add three quality contacts to your network



Search Twitter for popular hashtags like #FinancialAdvisor, #tax, or #retirement



Stay up to date on social media and technology with sites like fppad.com, financialsocialmedia.com, and advisortechtips.com



SHARE



Find two pieces of content from reputable news sources, bloggers, and other content creators



Add your perspective on the content and schedule it to publish the following week on LinkedIn, Twitter, and Facebook

ENGAGE



Like, Share, or Comment on LinkedIn updates you find relevant or interesting



Re-tweet three tweets from news sources or influencers



Start following three new influencers or news sources on Twitter



Compose two tweets that blend the professional with the personal



Todd Bainbridge
@ToddBbridge

Highs in the 80s today in #DFW. Out on the course with 3 great clients.

8:48am • 31 March 2014



Todd Bainbridge
@ToddBbridge

Filing quarterly #taxes today. 5 ways to avoid #AMT: www. etc

8:48am • 31 March 2014



QUARTERLY REVIEWS

EVALUATE INTERACTIONS



Review who has interacted with the content you've posted on social networks



Conduct an exploratory search on LinkedIn of your second-level connections to help determine who is your next-best lead



Score interactions: Decide if they qualify as leads or merit a follow-up

66%

of advisors
acquired new clients



Of those,
39%

gained \$1 million+
in new assets

Putnam Investments Survey of Financial Advisors' Use of Social Media (2014).

RATE YOUR CONTENT



Look at your social content portfolio to determine what is resonating with your network



Evaluate your use of each social network and rebalance accordingly



Remain compliant with your firm's social media policies



YEARLY UPDATES



Make sure your profile pictures and background images on social networks are up to date (keep in mind advertising regulations when selecting background images)



Edit your LinkedIn profile to reflect any professional recognition, volunteer work, honors and awards, or other achievements

Tip: To update your profile without notifying your contacts, click on the drop down next to your name and under the profile settings tab, turn off the activity broadcast notification.



Consider upgrading to a LinkedIn Premium account which allows expanded capabilities, including the ability to make your profile standout, grow your network more easily and to search for prospects more efficiently

FOLLOW THESE SIMPLE RULES FOR SOCIAL MEDIA



Focus on people, not products, and on relationships, not sales



Don't be afraid to mix the personal and the professional



Stay active: If you go quiet for even a week your network may question your commitment



OPTIMIZING YOUR LINKEDIN PROFILE

LinkedIn Account Type: Basic | Upgrade

Home Profile Contacts Groups Jobs Inbox 1 Companies



1

Todd Bainbridge 2

Financial Professional
with 20+ years of experience 3
St. Joseph, Missouri Area | Financial Services

Current: **Owner/Partner at ProWealth Advisors LLP** 4

Education: Tulane University - A.B. Freeman School of Business
Southern Methodist University

Connections: 500+ connections

Public Profile: <http://www.linkedin.com/in/toddbainbridge> 5

Put your best face forward with these tips

1 Add your picture

Choose an image where you're in a professional setting, dressed appropriately.

2 Use your professional name

Use the name you use professionally, even if it's a nickname. Also include both your maiden and married names if applicable.

3 Write a great headline

Your headline tells what you do, not your job title. Be sure to include "Financial Professional" in your headline.

4 Include your official job title

Your current job title is a key part of your profile and is a factor in how people will find you.

5 Optimize your LinkedIn address

LinkedIn will assign you a random web address. To help your profile show up more readily when people search for you on Google, change the URL to something that better matches your name.

- Under the Profile dropdown, choose *Edit Profile*
- Next to *Public Profile*, you'll see your LinkedIn URL
- Click *Edit* to change the URL
- To the right, in the *Your public profile URL* dialog box, click *Customize your public profile URL*
- Choose a URL that matches your name, e.g., *firstnamelastname*
- Click *Set Custom URL* to save your change

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Material developed in collaboration with Putnam Investments.

Financial representatives: Consult with your firm's compliance department and be fully aware of its policies and procedures before you engage in any social media activities or alter your public profile.

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