

# ADVISOR'S GUIDE TO SOCIAL MEDIA

Love it or hate it, social media is a powerful tool that advisors should be utilizing to help grow and promote business. Each post made by you and your team should amplify your core values and work toward the same objective. Before diving into the world of social, you should take a moment to evaluate your goals, and unify your message.

## DEFINING YOUR VOICE

When you boil it down, people work with people they like, people they trust. Social is the perfect place to show your brand's personality, demonstrate knowledge and even crack a joke (if that aligns with your brand).



### DEFINE

Whether your aim is promotion or prospecting, ask yourself: what do I hope to accomplish? Define your objectives:

- Connect with clients, Centers of Influence and prospects
- Share relevant content
- Promote events
- Built a strong prospect list
- Acquire new customers
- Increase traffic to your blog or website



### PRIORITIZE

Your posts should reflect your priorities, they may range from Fiduciary oversight to Retirement Readiness to Prospecting. List them below:

PRIORITY 1:

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PRIORITY 2:

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PRIORITY 3:

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PRIORITY 4:

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### DEVELOP

The words, images and tone you use on social matters. Take a moment to develop your voice.

#### Character/Persona

- Friendly
- Warm
- Inspiring
- Playful
- Authoritative
- Professional

#### Tone

- Personal
- Humble
- Helpful
- Honest
- Direct

#### Language

- Serious
- Simple
- Complex
- Insider
- Inclusive
- Fun

#### Purpose

- Educate
- Engage
- Inspire
- Entertain
- Inform



## WHEN TO POST

Each platform is unique from the timing and frequency of posts, to the language you use, to image sizes and hashtags.

B2B social media is best during the work week before and after work and during break times. Think of it as the modern newspaper, a source for information for prospects, clients and COIs.

### LinkedIn



| BEST DAYS:          |   |   |                                        |   |   |   | BEST TIME   |       |        |                     |       |       |       |
|---------------------|---|---|----------------------------------------|---|---|---|-------------|-------|--------|---------------------|-------|-------|-------|
| S                   | M | T | W                                      | T | F | S | 5-6AM       | 7-8AM | 9-10AM | 12PM                | 1-2PM | 3-4PM | 5-6PM |
| Posts: 2-5 per week |   |   | Ideal Update Length: 50-100 Characters |   |   |   | HashTags: 1 |       |        | Image Size: 700x400 |       |       |       |

### Twitter



| BEST DAYS:          |   |   |                                        |   |   |   | BEST TIME     |     |     |                     |     |     |     |
|---------------------|---|---|----------------------------------------|---|---|---|---------------|-----|-----|---------------------|-----|-----|-----|
| S                   | M | T | W                                      | T | F | S | 12PM          | 1PM | 2PM | 3PM                 | 4PM | 5PM | 6PM |
| Posts: 3-15 per day |   |   | Ideal Update Length: 71-100 Characters |   |   |   | HashTags: 1-2 |     |     | Image Size: 440x220 |     |     |     |

### Facebook



| BEST DAYS:          |   |   |                                       |   |   |   | BEST TIME     |      |      |                      |     |     |     |
|---------------------|---|---|---------------------------------------|---|---|---|---------------|------|------|----------------------|-----|-----|-----|
| S                   | M | T | W                                     | T | F | S | 9AM           | 10AM | 11AM | 12PM                 | 1PM | 2PM | 3PM |
| Posts: 1-2 per week |   |   | Ideal Update Length: 40-80 Characters |   |   |   | HashTags: 1-2 |      |      | Image Size: 1200x630 |     |     |     |

### Google+



| BEST DAYS:          |   |   |                                    |   |   |   | BEST TIME     |     |     |                     |     |      |     |
|---------------------|---|---|------------------------------------|---|---|---|---------------|-----|-----|---------------------|-----|------|-----|
| S                   | M | T | W                                  | T | F | S | 1PM           | 2PM | 3PM | 6PM                 | 9PM | 12AM | 2AM |
| Posts: 2-5 per week |   |   | Ideal Update Length: 60 Characters |   |   |   | HashTags: 2-3 |     |     | Image Size: 497x373 |     |      |     |



Advisors often wonder about the utility of hashtags and if, when, where and how to use them. For the platforms advisors use most often, you should have a maximum of 4 hashtags; don't forget to include your company or brand tag!



**Top Industry  
hashtags:**

#retirement #fiduciary  
#ERISA #money  
#retirementplan #401k  
#403b #fintech #retire #IRA  
#HR #SHRM



**DO**

Use specific or niche hashtags  
Include your company hashtag  
Capitalize multi-word hashtags for clarity  
Double check to make sure it means what you think it means  
Use hashtags in sentences



**DON'T**

Punctuate hashtags  
Over do it  
Use same hashtag in every post  
Use commas to separate hashtags