

The Financial Advisors' Guide to Writing Biographies, Blogs, Ebooks, and Case Studies

Whitepaper

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Writing online content effectively can be a key determinant to a prospect's decision to contact you. You need to be engaging, entertaining, and informative. But how can you do this? And what online content is the most effective for capturing leads? In this ebook, we will run you through a step-by-step guide on different strategies and best practices for writing online content.

Biographies

1

**Biographies
act as your first
impression
to clients and
prospects.**

A winning biography will give clients and prospects the right information to determine if you're a good match for them, as well as showcase your strengths and achievements.

What else should you include in your biography?

Your professional details

Show your readers why you decided to join the financial industry to help them get to know you. These could include:

- Financial title
- The number of years you've been in the industry
- Other relevant experience
- A reason why clients should choose you
- What you enjoy most about working with clients
- How you keep in touch with clients

Your qualifications

Show prospects your credentials to build trust in your expertise as an advisor. These could include your:

- Education
- Published works
- Awards and distinctions
- Professional designation

What else should you include in your biography?

Your strengths and beliefs

This section lets prospects understand what you specialize in and how exactly you can help them. Try to answer these questions:

- What makes you unique?
- What are your strengths?
- What are your beliefs about the profession?
- Do you work with a certain niche market?
- How do you help these niches?

Your community involvement

If you're active within your local community, let it be known! Try to answer these questions:

- What do you do in the community?
- Why is it important to you?

Your personal details

This business is all about building relationships, so let prospects get to know you on a personal level. This could include your:

- Marital and family status
- Hobbies and interests

Blogs

2

Blogs drive traffic to your website.

Blogs let you create valuable content for clients and prospects, and are critical for driving traffic back to your website. More importantly, they make you the industry expert on a subject.

For example, someone might google: “How to start saving for retirement.” All of a sudden, your blog post on retirement saving pops up. The reader likes what you’ve written and starts reading your blog all the time, i.e., constantly driving traffic back to your website and potentially becoming a lead.

Why is this important? As the number of people clicking on your blog increases, so does your ranking on Google. Eventually, you could be in the number one spot when someone Googles: Best Financial Advisors.

Insider Tips for Writing a Blog

1. Pick a topic that interests your audience. If it's not interesting, who's going to read it?

Start by identifying common problems that your clients have. Do you have a specific solution that differentiates you from others in the industry?

For example, if your target market is individuals approaching retirement, they're probably not interested in reading about paying off student loans. Write down 3 or 4 common problems, break them into sub-problems, and all of a sudden you might have a dozen topics to write about.

2. Make your intro captivating. Don't lose your reader after only one sentence.

The 3 best ways to captivate your reader: tell a story or joke, appeal to emotions, or provide a statistic. Having a captivating introduction will help to ensure your readers continue reading and finish your blog.

Here are three examples:

- **Story:** the other day I was at the grocery store when I noticed something interesting...
- **Emotion:** You want your child to live a full and happy life; if you don't set up a college savings account early, they might never be able to go.
- **Statistic:** 1 in 3 people don't have a retirement savings account, are you one of them?

Insider Tips for Writing a Blog

3. Write your blog in a logical order. Don't overwhelm your reader with information.

Before you get started writing, break down your information into a specific order. Once you start writing, you can fill in the blanks to your sections. Write about what you know and add in additional information and facts from research. Make sure to proof-read and edit your work; there's nothing more embarrassing than an obvious spelling or grammatical error.

4. Include a call-to-action. Invite people to return to your blog.

A call-to-action (CTA) asks readers to do something after reading your blog. This could be subscribing to your newsletter, downloading a PDF, or booking a meeting with you. This is a win-win for both you and the reader: they get more valuable content and you get a lead that could potentially turn into a customer.

E-Books



3

E-books are master lead generators.

E-books are electronic versions of books that can be viewed on phones, tablets, or computers. E-books provide information on a certain topic and are an awesome way to generate leads.

You can demonstrate to prospects that you're an expert in your field, as well as educate current clients on a certain subject. E-books can be paid (therefore a source of revenue) or free.

How do e-books generate leads? E-books are downloadable pieces of content, so you can ask individuals for information (email, name, etc), in order for an individual to download the e-book.

Insider Tips for Writing an E-book

1. Focus on your audience. Make it about them, not you.

Think of your e-book like an additional service. Instead of pitching your service offerings, you want your e-book to educate and inform the reader. Leave a lasting impression on readers by addressing an issue, challenge, question, or problem prospects have and provide a valuable solution.

2. Make a standout title and cover. Sorry, but people do judge a book by its cover.

No matter how amazing the content is inside your e-book, no one will read it if the title doesn't grab their attention. Titles that appeal to emotion or use statistics are a great place to start.

An engaging cover is just as important as an interesting title. Design your cover to match the tone and topic of your e-book. If you have zero graphic design experience, websites like [canva.com](https://www.canva.com) are a great place to start creating a captivating e-book cover.

3. Write content that engages the reader. Make it read like a story, not a lecture.

An e-book is not a textbook, you want it to read like a conversation or story. Imagine that you're sitting down with a client and helping them through a problem; your e-book should read similar to that. Include statistics, research, and quotes to help add more substance to your content.

Pro Tip: Use a larger font size, compelling headings and subheadings, lists, and keep paragraphs short and concise.

Insider Tips for Writing an E-book

4. Promote, promote, promote! No one is going to read it if they've never heard of it.

You've spent so much time writing and designing your e-book, what's the point if no one reads it? Create landing pages for each e-book and a series of call-to-actions on your blog, website, email, and social media. Using e-books for a PPC (pay-per-click) campaign is another great way to promote your e-book.

If you want clients to download your e-book, you're going to need to spread the word.

Case Studies



4

Case studies build trust with your prospects.

Disclaimer: some broker-dealers may not allow you to do case studies. Check with your compliance office before writing your own case study.

Case studies show prospects how your services have worked for other clients similar to them. Prospects don't want just your word that you're a great financial advisor, they want your client's word for it.

Case studies are a form of social proof, and social proof is one of the most effective marketing tactics to increase credibility and drive more conversions. What is social proof? Social proof is the "positive influence that's generated when people find out that 'everybody's doing it'."

Insider Tips for Writing a Case Study

1. Find the right client to feature. They should match your ideal customer market.

Whoever you choose for the case study, you want to make sure that they are very familiar with the service that you offer and that you have a good relationship.

More importantly, this person should match your ideal customer, someone that prospects would be able to relate to. Showcasing a client that identifies with your target audience will make you more attractive to prospects who are interested in your service.

2. Create a goal for the interview. What do you want readers to get out of the case study?

Set a goal for your case study. What do you want to learn? What do you want readers to take away?

Let the customer know the goal of the case study the moment you ask for an interview. You want them to feel prepared for the interview so that they can give their best answers. Think about how you want to format the case study when you ask for an interview. Do you want to film it? Do you want to be able to just hear audio? Is it a written document? This will help in creating a goal for the interview.

Insider Tips for Writing a Case Study

3. Format the case study. Make it easy to read.

Readers usually have a short attention span (like you right now - pay attention!). Keep things short and to the point by including:

- Bulleted lists
- Concise paragraphs
- Pictures
- Headers

You want your reader to be able to read the content quickly so that they understand the most important parts and get a great impression of your services.

4. Share your case study. Use it as a marketing and sales tool.

Sharing your findings from the case study allows prospects to see how your firm actually gets results for your clients. Use your case study as a sales and marketing tool.

Place your case study somewhere prominent on your website and share it with prospects that inquire about your services.

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