

# LinkedIn for advisers



onefamily

## We want to help you get more out of LinkedIn

LinkedIn is the professional social media platform. Most of us are on there, but many of us could be getting more out of it.

The opportunity is a particularly interesting one for equity release advisers. You can use LinkedIn to reach existing customers, potential customers, industry peers and providers.

In this guide we show you various ways to optimise your profile and the best ways to interact on LinkedIn. We've made our recommendations specific to advisers and illustrated best practice with real examples.

If you find it useful, let us know on [Twitter](#) or [LinkedIn](#).

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## Optimising your profile

### Custom web address

If you don't specify a custom web address (or 'URL') LinkedIn will add code to the end of your name, like this:

```
linkedin.com/in/your-name-123456789/
```

Ideally you want a custom URL that is easy to type, read, share and remember. Like this:

```
linkedin.com/in/yourname/
```

### Customising your URL

- Click 'Me' in the top right and then click 'View profile'
- On the 'View Profile' page in the top right there is a button titled 'Edit public profile & URL' – click it
- On the 'Edit My Public Profile' page top right type and save custom URL

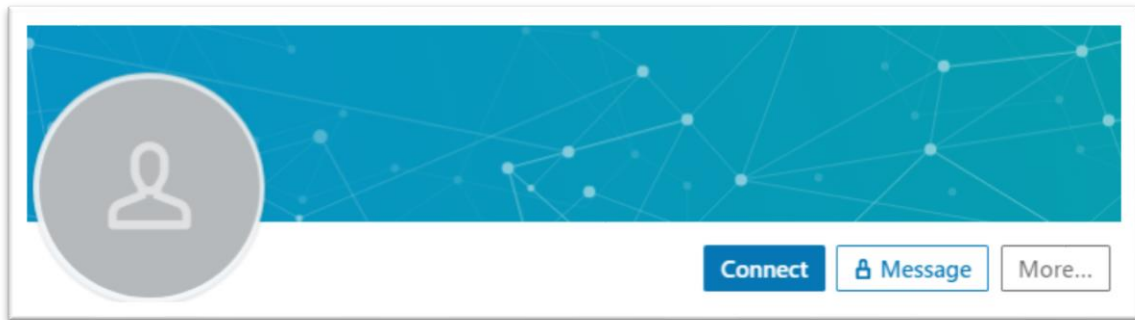
### Recommendations

- Keep it simple – use your name.
- If your name isn't available consider making a simple alteration, e.g. 'yourname1'. Remember 'yourname2020' is going to age poorly.
- Try to avoid punctuation that may be awkward to say, type or remember

## Profile image

If you don't add a profile image you appear on LinkedIn as a grey circle. It's not ideal for grabbing attention and some people may have trouble working out if it is really you.

Like this:



## Adding a profile image

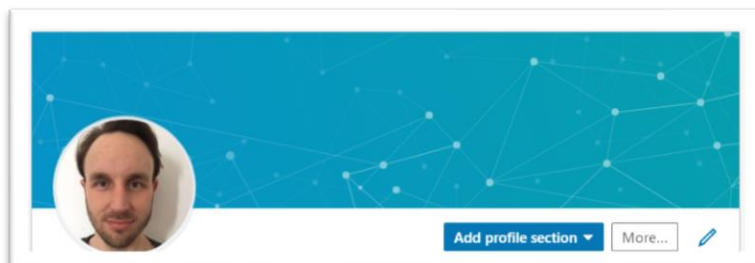
- Click 'Me' in the top right and then click 'View profile'
- Click the pencil icon on the right, in line with your profile photo
- On the 'Edit intro' pop up, click the pencil next to your profile image to upload a new one

## Recommendations

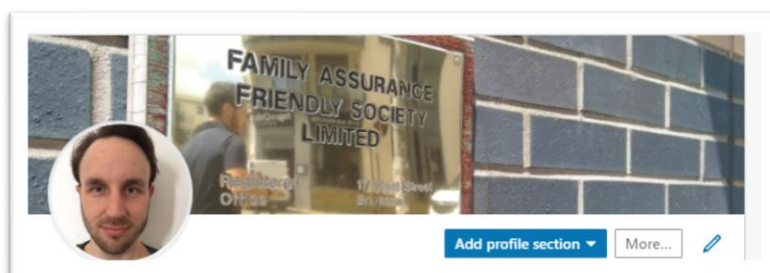
- It will crop to a circular shape, so try to use an image that is square
- Ideally profile photos should be 400 x 400 pixels, but larger is ok if it's smaller than 8MB and is not larger than 4320 pixels high or 7680 pixels wide
- File types PNG, JPEG or GIF – JPEG or PNG tends to work best for photos
- You can zoom and crop it within LinkedIn

## Header image

The header image is the wide image behind your profile picture. If you don't add a header image LinkedIn will add this blue universe/helix image:



I decided this shot of the plaque outside the OneFamily building was more interesting than the blue universe.



## Adding a header image

- Click 'Me' in the top right and then click 'View profile'
- Click the pencil icon on the right, in line with your profile photo
- On the 'Edit intro' pop up, click the pencil next to the header image to upload a new one

## Recommendations

- Ideal size for header images is 1584 x 396 but you can zoom and crop an image within LinkedIn
- File types PNG, JPEG or GIF – JPEG or PNG tends to work best for photos

## Headline

The headline is the small bit of copy that sits just below your name on your profile.

People tend to have “[Job title] at [Employer]”

But it doesn't have to be like this. Your current role is displayed under 'Experience', so you can be more creative and engaging with your headline.

Adding words and phrases here could help you appear in search when people search those terms. You can use up to 120 characters.

Here are some examples of equity release advisers going a bit further with their headlines:

*“Modern equity release expert helping clients and business understand how equity release can work for them 🏠💰”*

Most notably this one includes emojis – a house and a bag of money. Think carefully about whether emojis are right for you.

*“Local Later Life Lending Specialist for Equity Release and RIOs for clients 55+ in Hampshire and Wiltshire”*

Here are some examples of equity release advisers going a bit further with their headlines:

*“Owner of [Company] - Specialist Equity Release & Mortgage Advisers”*

This is a straightforward format that works well: [Job title] at [Company] – [Company description]

## Updating your headline

- Click 'Me' in the top right and then click 'View profile'
- Click the pencil icon on the right, in line with your profile photo
- On the 'Edit intro' pop up the 'headline' field is right underneath your name
- You can add up to 120 characters
- Click save

## Recommendation

- Use it as a way of better describing what your work entails, your purpose

## Consider

- *Helping customers understand their later life funding options*
- *Helping individuals and businesses release equity*
- *Equity release specialist at [Company]*
- *Later life lending specialist at [Company]*
- *Later life funding specialist at [Company]*



## About summary

This is an optional field, but a great opportunity to provide more information about yourself to people who view your profile.

Below is a good example of an about summary for a digital role. Rather than going into lots of detail, it gives an engaging top-level overview.

*I ship brilliant digital products.*

*Across teams, across disciplines, in the face of adversity, when the funding is flowing and when the budget squeezes the options – all I do is make it great and get it live.*

*Don't make it if you haven't thought about what it will do to people.*

The sentences are short and broken up with line breaks, so it doesn't look like a big block of text.

### Updating your about summary:

- Click 'Me' in the top right and then click 'View profile'
- 'Add profile section' – About – summary
- Up to 2,600 characters
- You can upload or link to media

## Recommendations

Here are some examples of adviser about summaries.

*Can equity release help you? FREE, NO OBLIGATION first visit to clients 55+ in Hampshire and Wiltshire. Release money FROM YOUR OWN HOME. Lost your job? Self-employed? Unable to get a standard mortgage? A life changing answer to solving a debt crisis or repaying an existing mortgage with no checks. TAX FREE CASH lump sum to help you live your retirement dreams. Perhaps a new car or luxury cruise. Why wait?*

Although this update is a good length, and could be considered compelling, the lack of line breaks and use of capital letters make it unappealing to read.

*I have worked in financial services for 35 years. By 2012 I developed an advisory proposition which helped me start my own equity release advice business.*

*I have a strong sense of ethics and believe in the delivery of sound advice. It's crucial for me to be able to break down complicated subject matter in a way that my clients understand.*

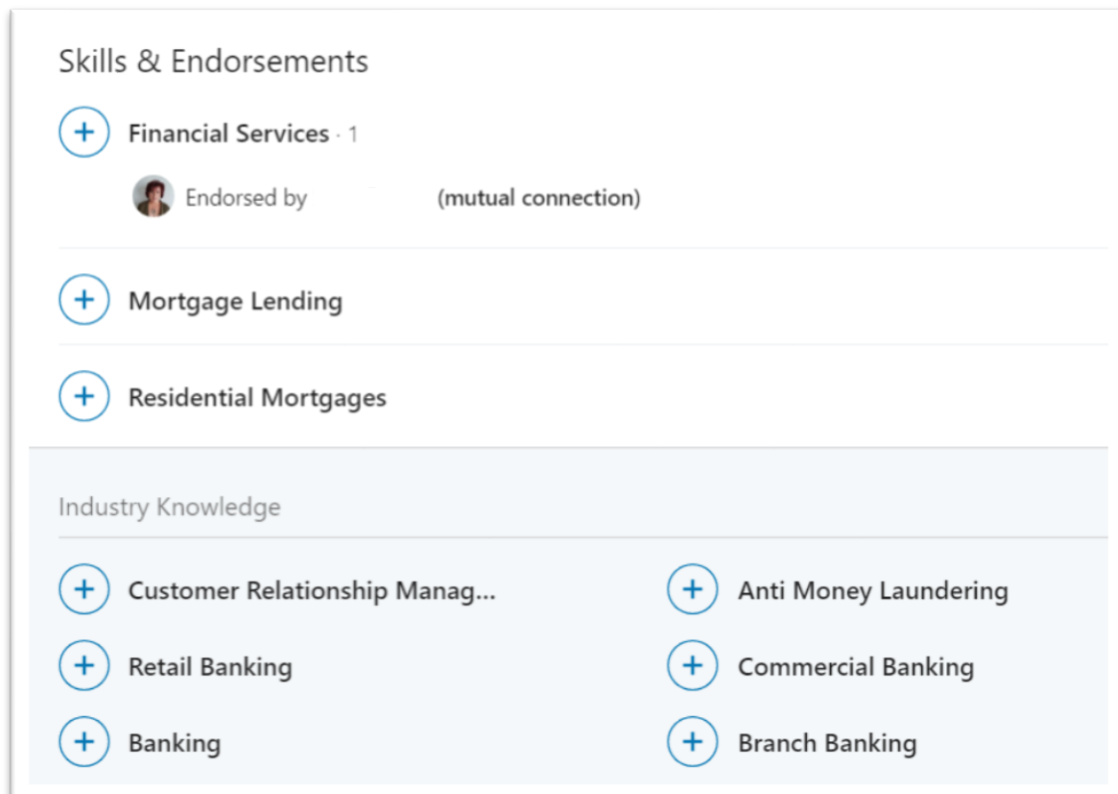
*At the heart of our business is a good sense of humour. My profile picture misrepresents my startling good looks.*

This is much better to draw inspiration from. It gently establishes authority, conveys a message about responsible advice and ends on a humorous note.

## Skills and endorsements

You can assign up to 50 skills to yourself, and when you do this, your connections can endorse you for those skills.

Below a connection has added 'Financial Services', 'Mortgage Lending' and 'Residential Mortgages' to their skills.



The plus icon next to each one means that as a connection I can endorse her for those skills.

You can see that a mutual connection. has endorsed this person for Financial Services.

You might want to consider adding skills like:

- Financial Advisory
- Equity Release
- Mortgage Lending
- Financial Services

## Add skills to your profile

- Click 'Me' in the top right and then click 'View profile'
- Scroll down to skills and endorsements box, in the top right you will see 'Add a new skill' – click here
- You can click the blue pencil icon next to 'Add a new skill' to re-order your skills

## Get endorsements

Once you've added the skills you can either sit and wait for endorsements, or you can take action to acquire some. The two main ways to do this are:

### 1. Endorse others for their chosen skills

If you endorse some of your connections for their chosen skills, you'll probably find they will reciprocate.

### 2. Ask for endorsements

It might seem cheeky, but sometimes if you don't ask you don't get. All they must do is hit the plus icon next to that skill on your profile, so it's a small ask. They'd probably appreciate it if you could endorse some of their skills in return.

If for some reason you wanted to hide an endorsement in the future, you can do so by clicking the skill then toggling Visible/Invisible next to the person's name.

Consider asking your colleagues for endorsements for skills they have seen you exhibit and offer to return the favour.

## Recommendations

You can give and receive recommendations on your LinkedIn profile.

This is a good way for people to say how good you were to work with.

On your profile the recommendations you have given and received will be displayed.

There are two main ways to get recommended:

### 1. Recommend other people

If you recommend other people, they are quite likely to recommend you back.

You don't need to be granular or specific with your recommendation, they can be much more general about how pleasant someone is to work with.

- Go to someone's profile
- Scroll down to recommendations
- Click 'Add recommendation'

### 2. Ask for recommendations

It might feel wrong but if you don't ask you don't get. There is a LinkedIn function to request reviews where you can include a private message for recipient, where you may be able to drop some hints about what sort of recommendation you are looking for.

- View your own profile
- Scroll down to recommendations
- Hit 'Ask for recommendation' in the top right
- Select a person to recommend you

## Accomplishments

Accomplishments give you an opportunity to showcase some of your achievements, this can include but is not exclusive to:

- Organisations you are a member of
- Publications where you are published
- Courses you have completed
- Awards you have received
- Exams completed
- Certificates gained

It's worth adding to your accomplishments over time.

### Add accomplishments to your profile

- View your profile
- Scroll down to Accomplishments
- Click the plus icon in the top right
- Add accomplishments

## Recommendations

You might consider adding relevant memberships and qualifications, e.g.

- Equity Release Council
- Chartered Insurance Institute
- London Institute of Banking and Finance
- FCA Senior Managers and Certification Regime

As well as any other professional groups or associations you may have a membership or other relationship with.

## Interests

Interests appear at the bottom of your profile and they are made up of companies, organisations, brands, publishers and other entities you follow on LinkedIn.

### Adding interests

Search for something you're interested in, visit the relevant page and hit 'Follow' in the top right.

### Consider following

- [OneFamily Adviser](#)
- [AIR Group](#)
- [AIR Mortgage Club](#)
- [The Right Mortgage & Protection Network](#)
- [PMS Mortgage Club](#)
- [HLPartnership](#)
- [Age Partnership](#)
- [Equity Release Council](#)
- [Equity Release Supermarket](#)
- [FT Adviser](#)
- [Mortgage Strategy](#)
- [Mortgage Solutions](#)
- [Key Retirement](#)
- [Key Advice](#)

## What to do

### Grow your network

Help you do your job, generate leads, but also engage on relevant subject matter, initiate and build relationships with co-workers, suppliers and even your friends.

### Consider

- [Chris Brown](#), Head of Distribution, OneFamily
- [Barbara Emmett](#), Head of Operations, OneFamily
- [Teddy Nyahasha](#), CEO, OneFamily

You will be recommended new contacts based on your existing network. You don't have to include a message with the request, but it is good manners, even if it's just "Hi [Name], I want to connect with you on LinkedIn. All the best, [Name]".

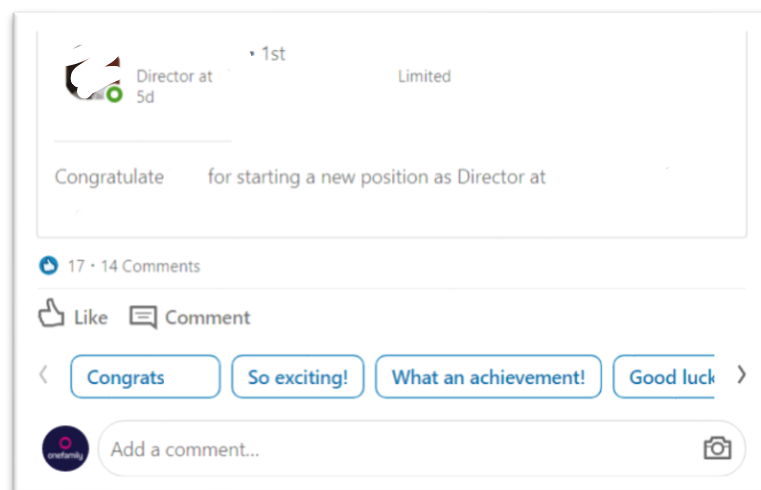


## Interact

Like any social media, LinkedIn users have a feed populated with the best-performing recent posts of their contacts and entities they are following.

If you want your contacts to see you, to engage with you, and potentially grow your network to their contacts, you need to be active through either engaging with other people or saying something yourself.

When you grow your network there will be more and more opportunities to engage, e.g.



There are three public ways to engage with someone's activity on LinkedIn:

### Comment

Add to debate, say thanks, but don't be pedantic or pick holes.

### Like

Nice, but it's not enough.

### Share

It's good to share interesting things with your network, and it might help you start building a relationship with someone.

More on sharing content next.

## Post

The other way to engage is to say something. Your activity appear in the 'Activity' box beneath your About summary and will appear on your connections' homepage feed.

## Status updates

Updates telling your contacts what you are or have been up to. Here's a good example of an adviser explaining how the client made their decision.

*I was up at the crack of dawn yesterday for a lengthy 8-hour round trip to the Isle of Wight to see some lovely new clients for an equity release plan. They're looking to repay their existing interest-only mortgage that is due to come to an end.*

*The client has already seen two other advisers, but after length pre-meeting phone conversation they said they would prefer to see me. They felt I had added value to the conversation including suggesting a product with a higher interest rate than others had quoted, but with a smaller lender fee.*

*A long journey, but worth it. I'm pleased they chose me, and it cost me nothing to add value.*

## Thanks, praise and congratulations

Congratulating and thanking colleagues, customers and partners.

*Walking towards New Street station last night with Bob and we stopped to chat to a man sat on the floor with his dog begging for change. I gave him some coins and he said "thanks, I'm saving up". We asked what he was saving for and he said he needed to put his dog in kennels for 6-8 weeks so he could get his leg injury sorted. Bob said "You really need support. You are putting your dog before yourself".*

*The man told Bob how much he needed and emptied his wallet. The man was refusing hospital treatment until he knew his dog was safe.*

*Bob you are a good man. #humankindness*

## Share content

Posting on LinkedIn doesn't have to mean coming up with a unique idea. Why not consider sharing useful or interesting content with your network?

Ideally when sharing content or other people's posts you should add your own commentary, even if it's just echoing the sentiments of the thing you are sharing.

When someone shared our interest-only mortgage story they added their own commentary.

now • 65

Interesting statistics from Onefamily regarding interest-only mortgages. Just imagine the difference speaking to an Equity Release adviser could make to some of these people.

**OneFamily Adviser**  
68 followers  
3h • 65

Over 40,000 interest-only mortgages are set to mature in 2020, according to the FCA.

**UK Finance** broke them down by age and outstanding debt:  
<https://lnkd.in/ddqFZAD>

Find out how to help interest-only mortgage borrowers here:  
<https://lnkd.in/dvndXRF>

Age of borrower	<£50K	£50K - £100K	£100K - £150K	>£150K	Total
<45	~500	~500	~500	~500	~2,000
>=45 - <55	~2,500	~1,000	~500	~500	~4,500
>=55 - <65	~5,500	~3,000	~1,500	~1,500	~11,500
>=65 - <75	~5,000	~4,500	~3,500	~4,000	~17,000
>=75	~1,500	~1,000	~500	~500	~3,500

Helping interest-only mortgage borrowers | OneFamily Adviser  
onefamilyadviser.com

Some of the content you share might be closely related to mortgage advice, others might be more loosely connected like retirement, home improvements or travel. It could have a much broader appeal if it is just a topic of general interest or an observation about working life.

You can also share video and documents directly by uploading them on LinkedIn.

Potential post themes:

- Home improvements
- Helping kids onto the property ladder
- Paying for care
- Equity release/lifetime mortgages
- Interest-only mortgages

## Checklist

If you want to structure your LinkedIn improvements and activity you can use the checklists below.

### Optimisation

Get a custom URL	
Headline	
Recent profile image	
Header image	
About summary	
Education and experience	
Add five skills	
Add five accomplishments	
Add your LinkedIn profile to your email signature	

### Actions

Endorse five colleagues or ex-colleagues for relevant skills	
Request endorsements from 5 colleagues or ex-colleagues	
Give three recommendations to colleagues or ex-colleagues	
Ask three colleagues or ex-colleagues for recommendations	
Follow all suggested	
Connect with all the people recommended	
Comment, like or share 5 LinkedIn posts	
Post a status update	
Share some content with your own comment	