

# HOW TO OPTIMIZE YOUR ADVISORFINDER PROFILE

Why is it important to have a complete and optimized AdvisorFinder profile?

1. Attracts more clients and enables you to stand out from other advisors
2. Showcases your unique self, which helps prospects understand who you are and what you do
3. Demonstrates transparency, which helps build trust and confidence with prospects
4. Improves search rankings on AdvisorFinder, leading to more meetings
5. Increases visibility on and off of AdvisorFinder, which makes it easier for prospects to find you

It demonstrates trust and credibility

Additional resources that will help you grow more effectively and quickly:

- [How to create better content as a financial advisor](#)
- [Improve your client onboarding process](#)
- [Master digital marketing as a financial advisor in 2023](#)
- [How to attract more millennials and HENRYs](#)

[Read More on our Blog](#)

## AdvisorFinder is on a mission to increase access to financial advisors

AdvisorFinder is an online marketplace that helps people find the right financial advisor, whether looking for the first time or researching a recommendation. Additionally, we enable financial advisors to spend more time doing what they love, helping their clients, but not at the expense of their time and money.

This guide will help you optimize your AdvisorFinder profile and online presence so you can be discovered by more people needing your help.

By solving the root cause of the client acquisition problem felt by so many advisors, AdvisorFinder is on a mission to increase access to advisors that want to help.



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# ADVISORFINDER

Helping people connect with  
the right financial advisor

## FAQS

### Can I share my AdvisorFinder profile?

Yes! Your profile on AdvisorFinder is designed to offer an amazing user experience with clear and concise information about your experience, qualifications, specialties, and more. This enables your future clients to feel more confident about what you do, which results in higher conversion rates and more meetings.

### How is AdvisorFinder different than my website?

Consumers tend to trust third-party sources, like AdvisorFinder, more than first-party sources, like personal websites. This is because third-party sources are perceived as more objective and unbiased. And your future clients are familiar with third-party sources: Airbnb, Zocdoc, Amazon, and more. Additionally, many advisor websites are hard to navigate and update - AdvisorFinder is not!

- Better user experience on AdvisorFinder results in more meetings with prospects
- More exposure to high-intent prospects
- Profiles are complimentary to your own website and strengthen your online presence
- Allows prospects to clearly understand what you do, which leads to more meetings

### How much time do I need to spend on AdvisorFinder?

AdvisorFinder is designed to save you money AND time, unlike other lead generation platforms that require you to race to the phone if you've received a match. To keep up with future product updates, you'll likely spend about 15 minutes per month updating your AdvisorFinder profile. However, you'll need to monitor your email for any meeting requests (all meeting requests are shown on your AdvisorFinder dashboard too).

If we missed something or if you have any questions,  
please reach out to our 24/7 support team



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## BEST PRACTICES

### Optimize your bio

- Include 2-3 paragraphs and use 200+ characters
- Paragraph 1: describe whom you work with, your style of working with clients, your experience in the industry, and other relevant info about your experience
- Paragraph 2: describe your journey in the industry, why you decided to become a financial advisor and include info about potential teams or firms you work with
- Paragraph 3: describe what you like to do for fun, share something interesting or unique about yourself, and share a few personal bits about yourself

### How many Clientele or Specialties should I pick?

- We've found the most successful advisors on AdvisorFinder choose between 4-8 clientele and specialties and expertise
- More is NOT better
- Be specific here, and make sure you order them as you wish

### Other notable best practices

- Don't forget to include your job title (found in settings)
- Adding a video to your profile results in higher meetings requested
- Adding every credential to your name confuses individuals - don't go overboard
- Be on the lookout for AdvisorFinder updates that pertain to your profile - you'll likely spend 10 minutes a month ensuring it's up-to-date

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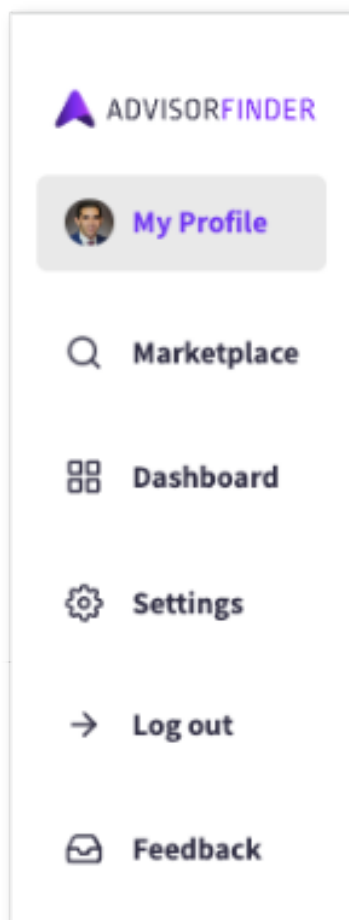
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## SIDE MENU NAVIGATION

### Step 1. Accessing your profile, settings, and more

Once logged in, you'll see a side navigation menu on the left. This is how you'll navigate around the different parts of the platform.



→ Access your profile: view or edit it here

→ View the marketplace of other advisors

→ View meeting requests, leads,  
and data analytics on visitors

→ Change your email and  
password, and add your job title,  
Calendly URL, and employer

→ Submit any feedback or bugs here



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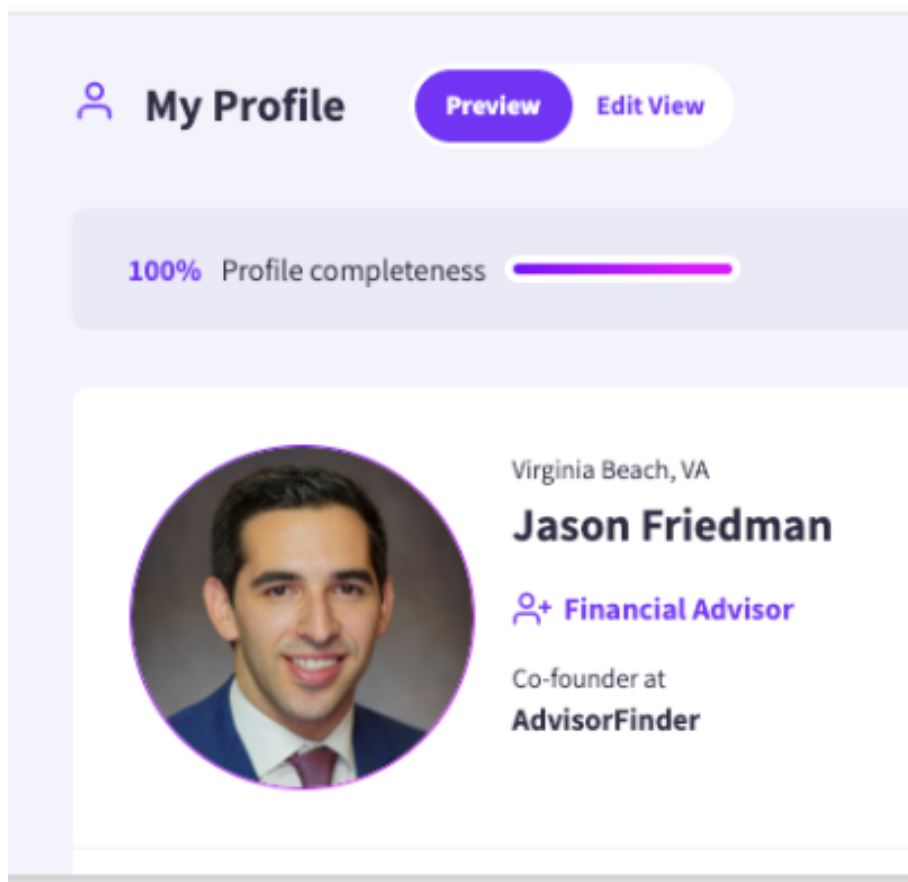


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## EDIT YOUR PROFILE

### Step 1. Edit and view your profile



When you click your profile, you can choose to Preview or Edit.

- **Preview:** allows you to see what prospects see (does not include the call-to-actions for them to book a meeting with you)
- **Edit View:** allows you to edit your profile
- **Completeness Score:** shows you if you missed any parts of your profile. See below for details

20%	Profile Picture
20%	Introduction
10%	Services Provided
10%	Specialties and Expertise
10%	Clientele
10%	Credentials and Designations
10%	Pricing Models
10%	Education



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## EDIT YOUR PROFILE

### Step 1a. Edit and view your profile


**Allow Me to Introduce Myself** 

Provide some background details for your potential clients.

TEST PROFILE: I AM NOT A FINANCIAL ADVISOR.


Prior to AdFi, Jason worked in the wealth manageme...  
industry for UBS, Wells Fargo Advisors and Merrill

Tell your story in video




 Add video




When editing your profile, look for  
the pencil or the addition icons.  
These will enable you to edit each  
individual profile field.




You'll notice Specialties and  
Expertise and Clientele have small  
lined icons next to them. This  
allows you to click and drag them  
in the appropriate order you want  
displayed.



**Specialties and Expertise**  11


Inform customers of your areas of expertise.

 Credit & Lending Needs  Cryptocurrency & NFTs  High Net Worth Planning


 Alternative Investments  Trust Services  Philanthropic Efforts

 Debt Management  College Planning  Dealing with Bankruptcy

 Cash Flow Analysis  Tax Preparation

**Clientele**  1

Let customers know some of the demographics you commonly work with.

 Retirees



#### NOTE!

Pay attention to the  
order you put these in.  
The first three will be  
shown to prospects first



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## EDIT YOUR PROFILE

### Step 1b. Edit and view your profile

To add a credential or designation, simply click on the search bar to scroll or type in your credential. If one is missing, please let us know.

Don't forget to confirm each time - this applies to other areas of your profile too.



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## EDIT YOUR PROFILE

### Step 1c. Edit and view your profile

Need to add a custom disclosure or  
an RSNIP disclosure? No problem!

Scroll to the bottom of your profile  
and click the pencil icon next to  
Advisor Disclosure.

✕

**Advisor Disclosure**

Provide any needed advisor disclosure

Disclosure Text

Add yours here!

15 / 2500

☒ Add RSNIP Disclosure?

Investment and Insurance Products are:

- Not Insured by the FDIC or Any Federal Government Agency
- Not a Deposit or Other Obligation of, or Guaranteed by, the Bank of Any Bank Affiliate
- Subject to Investment Risks, Including Possible Loss of the Principal Amount Invested

Cancel

✓ Confirm



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## HOW TO RECEIVE A MEETING REQUEST

### Step 2. Receiving meeting requests

There are two main ways to receive meeting requests:

1. Use your Calendly URL or other meeting software
2. Make sure your phone number and firm-specific email are provided within settings

Account Information	
Name:	Jason Friedman →
Email:	Jason@joinadfi.com →
Job Info:	Co-founder at AdvisorFinder →
Phone Number:	7571111111 →

This will allow prospects to directly schedule a meeting with you or submit a request to meet with you



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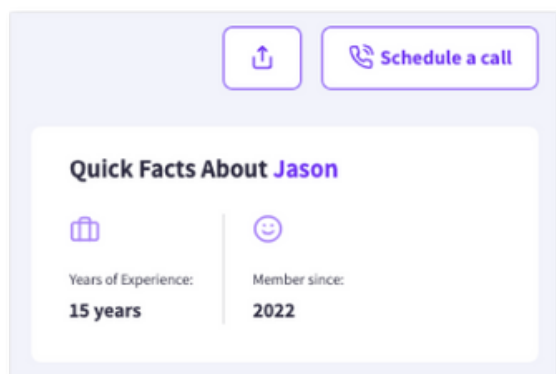
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## HOW TO RECEIVE A MEETING REQUEST

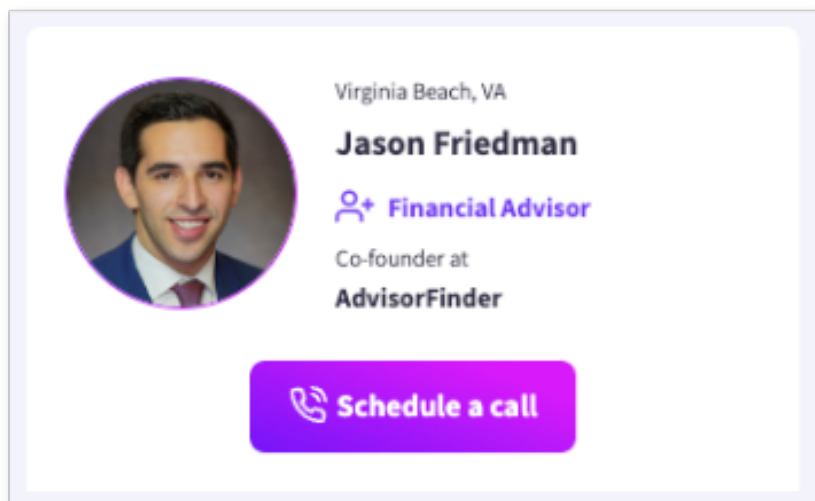
### Step 2a. Receiving meeting requests

Prospects will see these two call-to-actions, which allows them to schedule a meeting

1



2



#### What happens next?

1. You'll receive an email stating that a prospect has scheduled a meeting with you
  - a. If you have a third-party calendar integrated, the meeting will already be booked
  - b. If you do not, you'll be told whether the prospect wants to contact you first or vice versa
2. You can view this request in your dashboard or email inbox



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## THANK YOU

We appreciate you! Thank you very much for trusting AdvisorFinder in our earliest days. We are committed to building the best experience and product for you and your future clients. The feedback you provide us will directly impact how we improve AdvisorFinder, so please let us know what's on your mind.

Solving the billion-dollar client acquisition problem takes a nuanced approach - we don't believe the solution involves selling you leads. The solution lies in the challenges prospects face, which is why we are addressing the core issue at AdvisorFinder.

We put the client first, just like you do. Thank you again for joining AdvisorFinder and being a part of the journey from the early days.

Thank you,  
Jason Friedman  
Co-founder and CEO



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