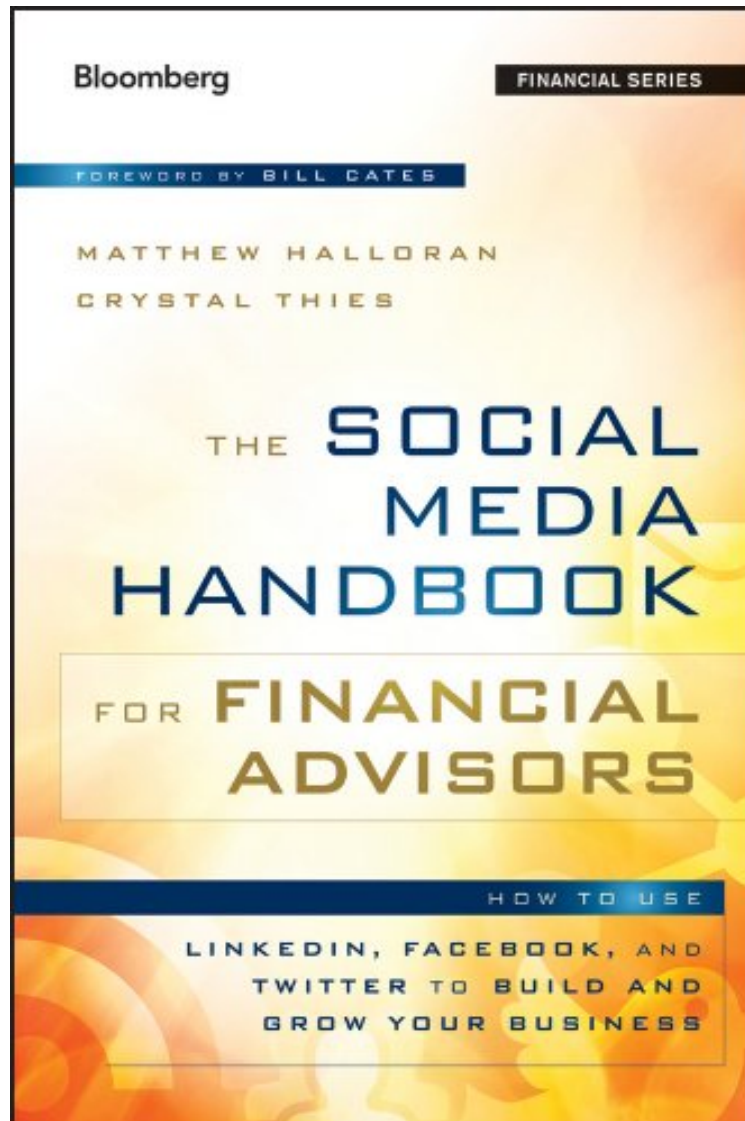


(Free pdf) The Social Media Handbook for Financial Advisors: How to Use LinkedIn, Facebook, and Twitter to Build and Grow Your Business (Bloomberg Financial)

The Social Media Handbook for Financial Advisors: How to Use LinkedIn, Facebook, and Twitter to Build and Grow Your Business (Bloomberg Financial)

Matthew Halloran, Crystal Thies
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Matthew Halloran, Crystal Thies : The Social Media Handbook for Financial Advisors: How to Use LinkedIn, Facebook, and Twitter to Build and Grow Your Business (Bloomberg Financial) before purchasing it in order to gauge whether or not it would be worth my time, and all praised The Social Media Handbook for Financial Advisors: How to Use LinkedIn, Facebook, and Twitter to Build and Grow Your Business (Bloomberg Financial):

8 of 8 people found the following review helpful. A Breath of Fresh Air-The Social Media Handbook for Financial Advisors By Jimbo The Social Media Handbook for Financial Advisors: How to Use LinkedIn, Facebook, and Twitter to Build and Grow Your Business (Bloomberg Financial) I am reading this book over and over (and over). As a financial person who deals with the daily need for new business and new clients, I found this book to be the perfect tool for getting to understand the value of the Big Three social media vehicles and what they can mean to a financial services person. As much as I have been on Facebook and LinkedIn, I had absolutely no idea of the power these things can have to help you develop relationships and, later, clients. Both authors are accomplished veterans of social media in their own right, as well the finance and investment industry. This is must reading for the financial services person who's been hiding behind the "this is a face to face trust building business" mantra as I once did. Wake up, Dude, the revolution's well underway. Finally, and thankfully, the authors start by addressing the area all of us have come to love so well: compliance. Two thumbs up for Halloran and Thies!

0 of 0 people found the following review helpful. if you are completely unfamiliar with social media, this is a good start By JM good introduction to social media for FA's, but somewhat lacking in depth. if you are completely unfamiliar with social media, this is a good start - I wish it were more detailed and current, if it was, I'd probably rank it higher.

0 of 0 people found the following review helpful. Three Stars By Jennifer Atkinson I was hoping for a bit more in depth ideas but this is for a very basic beginner.

Expert advice for financial advisors looking to make the most of social media platforms Social media is everywhere. 3.5 billion pieces of content are shared on Facebook each week, 22 million professionals are networking on LinkedIn, and 140 million tweets are posted every day. The opportunities these platforms present for financial advisors are huge, but most advisors have no idea how to use them to build bigger, stronger client bases. The Social Media Handbook for Financial Advisors: How to Use Facebook, Twitter, and LinkedIn to Build and Grow Your Business shows how to make the most of these new tools, offering invaluable advice about how to connect with potential clients in the twenty first century. For most advisors, converting prospects into clients is their top priority, and social media presents incredible opportunities for sealing the deal. Sales don't happen because clients are impressed by complicated charts, they happen because they're impressed by your social media presence, and by properly understanding how to make these new platforms work for you, you'll be positioned to see your business boom. Designed to teach financial advisors how to use social media to better market their services to attract new clients and referrals Presents expert communication advice from top financial advisor coach Matthew Halloran Categorizes communicators in a unique new way Teaches financial advisors how to use social media in new, highly effective ways that they've never even considered An essential resource for wealth managers and financial advisors looking to amplify their marketing message and raise their visibility in a crowded marketplace, The Social Media Handbook for Financial Advisors is the only book you need to make yourself heard.

From the Inside Flap Financial advisors are always on the lookout for something that will give them a competitive edge, and when it comes to marketing a firm to current and potential clients, nothing beats the benefits offered by social media tools. Unfortunately, most advisors have no idea how to cash in on the opportunities these platforms present for building a bigger, stronger client base. The Social Media Handbook for Financial Advisors is here to fix that, bringing together important information and invaluable insights to help you put social media to work for you and your firm. Beginning with an introduction to social media that explores how to establish a rapport with your clients on the web, streamline your time online, and much more, the book covers each of the "big three" sites—LinkedIn, Facebook, and Twitter—in detail. Looking at what each of these social networking services can do for your business, the book brings together the hottest topics in social media for financial advisors—from advertising on Facebook to using LinkedIn to connect with prospective clients—in one definitive volume. Explaining, step by step, a proven process for making the most of social media, the book shows you how to set up accounts, as well as how to use built in tools to find and contact new clients. Throughout, the authors discuss the pesky role compliance plays in limiting what you can and cannot say and do online, while providing indispensable advice on what you'll be able to do with your accounts once current rules change. Filled with engaging anecdotes, illustrative visuals, and end-of-chapter takeaways that reinforce the key concepts that you need to understand to get social media working for you, The Social Media Handbook for Financial Advisors is an essential resource for anyone working in financial advising. In-depth and accessible, it gives you everything you need to amplify your marketing message and raise your visibility in an increasingly crowded marketplace.

From the Back Cover Praise for The Social Media Handbook for Financial Advisors "Matt Halloran and Crystal Thies have written the preeminent book for advisors looking to leverage social media. This is a must-read for each and every financial advisor that wants to grow their business in the 21st Century." —Matt Ackermann, Online Editor in Chief, SourceMedia "A social media 'turn-on.' The Social Media Handbook for Financial Advisors is not the typical guide to social media with a staggering number of tedious pages to wade through and sold by the pound. Crystal Thies and Matt Halloran have created an easy-to-read, informative resource filled with setup for beginners, proper guidance for everyone, and real-world examples that will help every independent financial advisor looking to benefit from using social media—both those just starting and those knee-

deep. Not a social media inhibitor but a motivator to fully implement LinkedIn, Facebook, and Twitter into your advisory practice."mdash;Barry A. Weinstein, Vice President, Sales Marketing, Advisor Products Inc."I have worked with Matt Halloran for years, and his enthusiasm for helping others to succeed knows no bounds. Here he takes a topic, social media, that most financial advisors regard with a mix of fear, loathing, and misperception, and makes it approachable. Any FA even remotely curious about the power of this tool, be it for raising visibility, communicating with clients, prospective clients, peers, or the media, will appreciate this book."mdash;Jason Lahita, MBA, Director, Cognito Los Angeles"Financial advisors seeking a comprehensive strategy on how to increase exposure through social media need this book. Crystal's command of the topic is second to none and her specific strategies showcased here work; I've used them."mdash;Ned Van Riper, cofounder, JoinaFirm.com

About the Author Matthew Halloran first became interested in social media when Myspace was the place to be. With over 80,000 Twitter followers with a 99 percent effectiveness rating, 1,000 LinkedIn connections, and 700 Facebook fans, he knows how to gain followers to help build business. Having coached and consulted hundreds and spoken to thousands of financial advisors, Halloran knows how financial advising practices work, and believes that social media is the new marketing frontier for transforming the prospecting aspect of any financial services practice. He is the Director of National Development for GIVE Strategy, a mission-driven company that focuses on helping connect financial advisors, CPAs, estate planning attorneys, clients, and planned giving directors to redirect \$1 billion to charity, and the founder and President of Top Advisor Coaching.

CRYSTAL THIES first learned of LinkedIn while deciding to return to financial planning, an industry she left for almost a decade to focus on charitable giving in the nonprofit sector. Thies saw LinkedIn and social media as the way to quickly reignite her financial planning practice while combining her two key knowledge bases of financial planning and charitable giving. The call of social media won out, and Thies started Crystal Clear Buzz, LLC. For more than three years, she has helped small and large businesses, sales teams, and sales professionals use social media for sales and business development. Because of her experience and expertise as a licensed financial planner, Thies's clients include many RIAs and financial advisors, in addition to major broker-dealers, wirehouses, and banks. Thies is known as the "LinkedIn Ninja"mdash;a title given to her by her clients and followers.