



Built on TRUST

**Unlock the Power of Storytelling to
Build Authority and Attract the Right Clients
on LinkedIn**

*A Proven Guide for Financial Consultants and Leaders
to Build Trust, Influence, and Inbound Leads
Through Storytelling*

BY RATNA JUITA

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01

The MDRT Aspirant's Dilemma

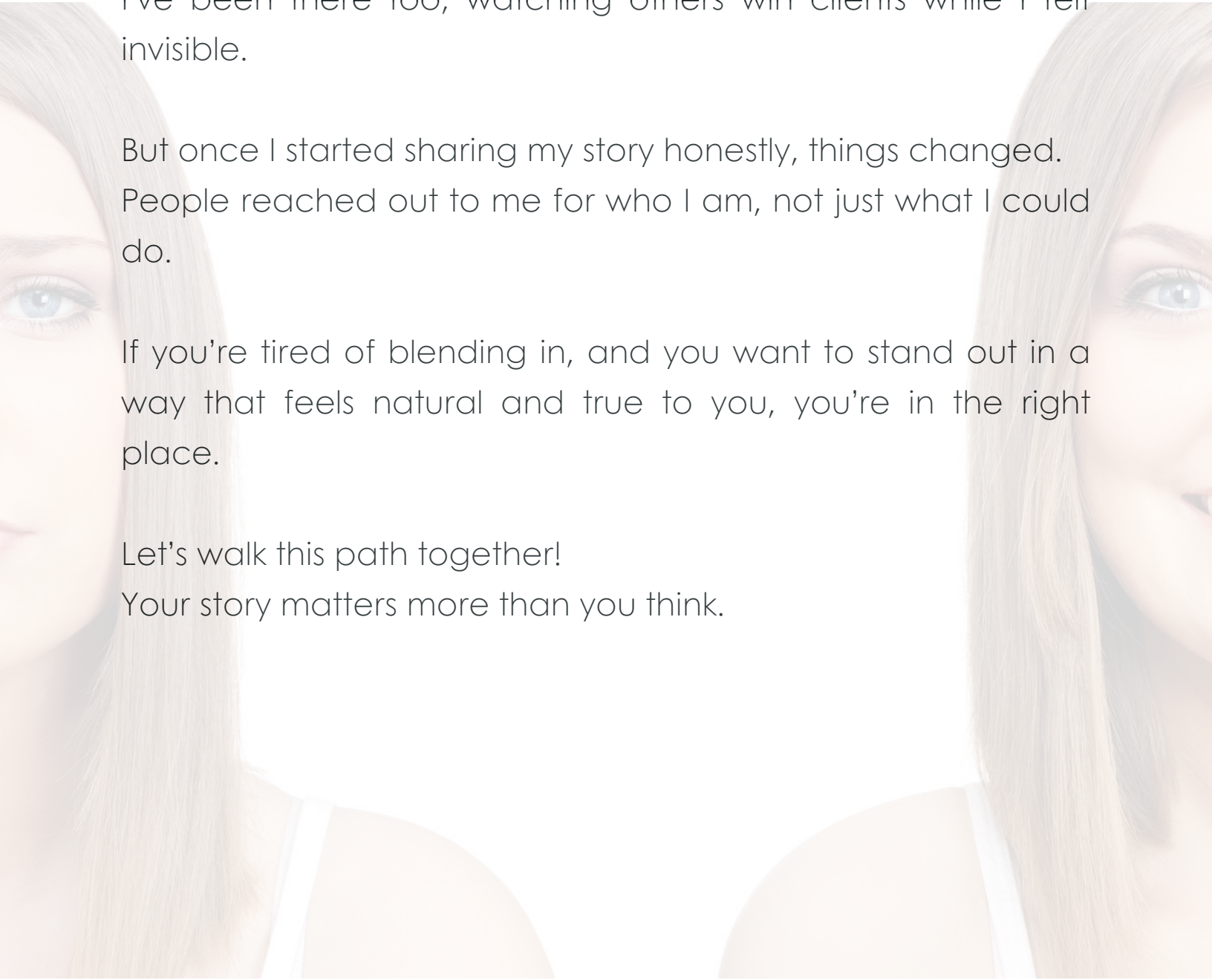
Have you ever asked yourself, “Why do some advisors reach MDRT so quickly, while others, who work just as hard - keep falling short?”

I've met so many bright, caring advisors who know their stuff, but still see clients choose someone else. You put in the hours, you care about your clients, but it's like no one sees the real value you bring.

Sometimes you wonder, “Is there something wrong with me?” Let me say it clearly: it's not your fault. The world rewards visibility, not always skill.

Here's what the top 1% do differently, they don't just work harder: they've learned how to let their real story and personality shine.

They don't try to be someone they're not, and they don't need to shout to be seen. They simply show up as themselves, and that's what draws people to them.



I know what it feels like to be overlooked, even when you have so much to offer.

I've been there too, watching others win clients while I felt invisible.

But once I started sharing my story honestly, things changed. People reached out to me for who I am, not just what I could do.

If you're tired of blending in, and you want to stand out in a way that feels natural and true to you, you're in the right place.

Let's walk this path together!
Your story matters more than you think.

02

Are You Seen or Overlooked?

Why Your LinkedIn Profile Matters More Than You Think

Let's talk honestly. When was the last time you checked your own LinkedIn profile?

Or maybe you tried searching for another advisor and all you found was a blank photo, no updates, no stories - just a name and a job title. It's like there's no real person there at all.

Here's the thing:

Your LinkedIn profile is often the first "hello" people get from you.

If you don't show up there, people won't know who you are, what you stand for, or why they should trust you. In today's world, if you're not online, you're almost invisible.

Why Does This Happen?

Most advisors I meet are so focused on serving clients and chasing targets that they forget about their online presence.

Some feel shy, thinking, “I don’t have anything special to say.” Others worry, “What if I post something silly?” Or maybe you just think you’re too busy to bother.

But here’s the truth:

If your profile is empty or out of date, people hesitate to connect with you.

Sometimes, they even think you’re not serious about your work.

That means lost trust and lost opportunities - even before you’ve had a chance to talk.

Do People Know You’re There?

When your LinkedIn profile is empty or outdated, people aren’t sure if you’re really there. It’s like walking past a shop with the lights off - most people won’t go in.

With no photo or updates, new contacts hesitate to trust you or take you seriously.

Clients and partners usually check your profile before replying. If they see nothing, they'll likely move on to someone who looks more present and trustworthy.

You might miss out on referrals, new partnerships, or messages because you didn't show up. If you're not visible online, your story and value get overlooked.

How to Start Showing Up as a Guide

You don't have to be perfect. You don't have to post every day. Just start small!

- **Update your photo** with a simple, friendly picture. Smile. Let people see the real you.
- **Write a story** about why you became a financial advisor or a story about how you helped someone. Real stories matter more than fancy words.
- **Say congrats** or comment on someone else's post. Show that you're part of the community.

Think of your LinkedIn as your digital living room. You're inviting people in - not for a sales pitch, but for a real conversation.

💡 Case Study: “How One Story Post Sparked Inbound Leads Within 3 Minutes”

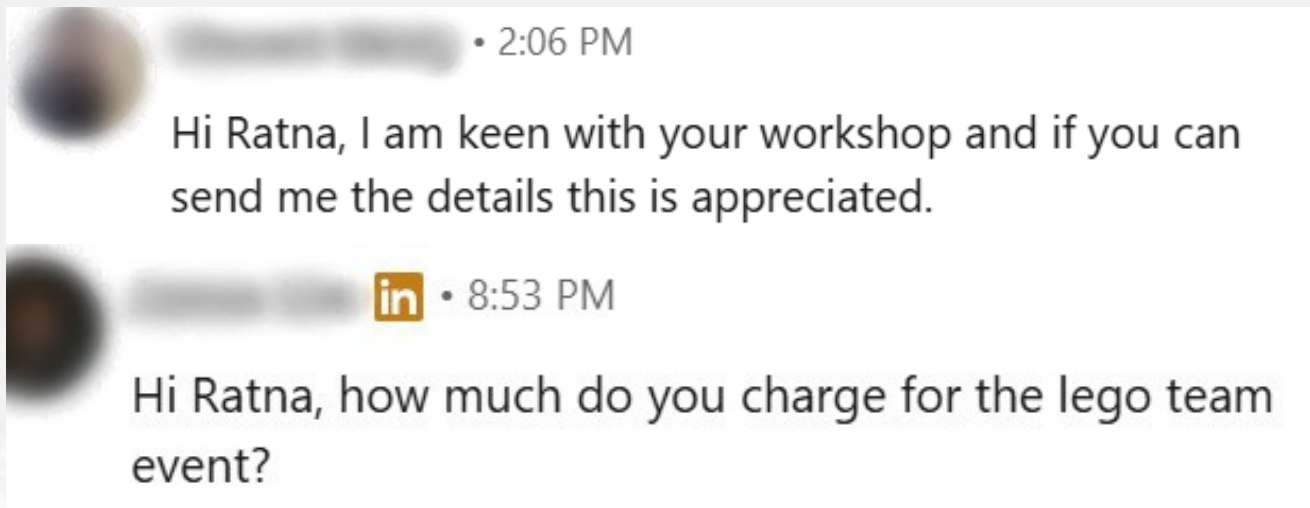
Let me show you how this works in real life.

Here’s a LinkedIn post I shared after completing my **LEGO® Serious Play Facilitator Certification**:



✓ What Happened Next?

Within 3 minutes after posting this, I received an inbound lead, with another within the day!








By the end of the day, I had 2 consult calls booked—**all from these story posts.**

No pitching, no selling.

Just sharing my experience with gratitude.

🔍 Breakdown: Why This Post Converted

Element	What It Did
 <i>Personal Insight</i>	Built emotional connection ("I cried while sharing my core identity model")
 <i>Relatable Feelings</i>	Laughter, tears, joy—universal emotions drew people in
 <i>Unique Offering</i>	Positioning LSP as more than “just play”—as a tool for inclusion + growth
 <i>Soft Call to Action</i>	“If you’re looking for... DM me 😊” – Low pressure, high clarity
 <i>Celebratory Energy</i>	People love to celebrate growth—they want to be part of your win

Ask Yourself

- Does your LinkedIn profile feel like you, or is it just an old resume?
- Would someone feel welcomed or confused after looking at your page?
- What’s one story you can share this week to show your heart and your values?

You're Not Alone

If you feel nervous or unsure, that's normal. I've been there, too. The first time I posted about my own struggles, I worried what people would think.

But you know what? More people reached out, and I made real connections. Being real is always better than being perfect.

03

Tell Your Story, Don't Just Share Your Stats

Have you noticed how LinkedIn is filled with numbers? Everyone's sharing their awards, targets, and how many clients they served this month. But, let me be honest - numbers are easy to forget.

What really sticks is a good story, especially when it comes from the heart. I still remember the first time I felt nervous before meeting a prospect. I thought people might judge me, but instead, my prospect said, "I have been following your story, very inspiring, Ratna!" Suddenly, trust is built instantly.

Why Stories Matter

When you share a story, maybe about a mistake you made, or a lesson you learned, you become real to others.

People start to trust you, not just because you're an expert, but because you're human. They see you as someone who understands them, someone they can talk to.

Think about it:

Do you remember someone's sales target, or do you remember how you helped a client during a tough time? Stories help people feel close to you. It's how friendships and good business start.

How to Start Sharing Your Story

You don't have to write a long post. Just start with something small and true.

- Share a lesson you learned this week, even if it was from a mistake.
- Talk about what keeps you going, even on hard days.
- Tell us about a client who surprised you or made you smile.
- Maybe just share why you became a financial advisor in the first place.

Use simple words. Speak from your heart. Even one honest story can make a big difference.

Being Real is Better Than Being Perfect

If you feel shy or worried about sharing too much, you're not alone. I used to hide my struggles too, thinking I had to look perfect. But when I shared the real me, more people reached out and wanted to connect. It made my network warmer and stronger.

When you tell your story, you're not just selling your services - you're letting people know who you are. That's what makes you stand out.

Pause and Think

- What's one real story you can share this week?
- How could your experience help someone else feel less alone?
- Is there something you've been afraid to say, but know it could inspire others?

💡 Case Study: “How Sharing My Inner Shift Attracted Ready-to-Invest Clients”

This is one of my favorite types of stories, the kind that blends *vulnerability, transformation, and inbound client attraction* in a single post.

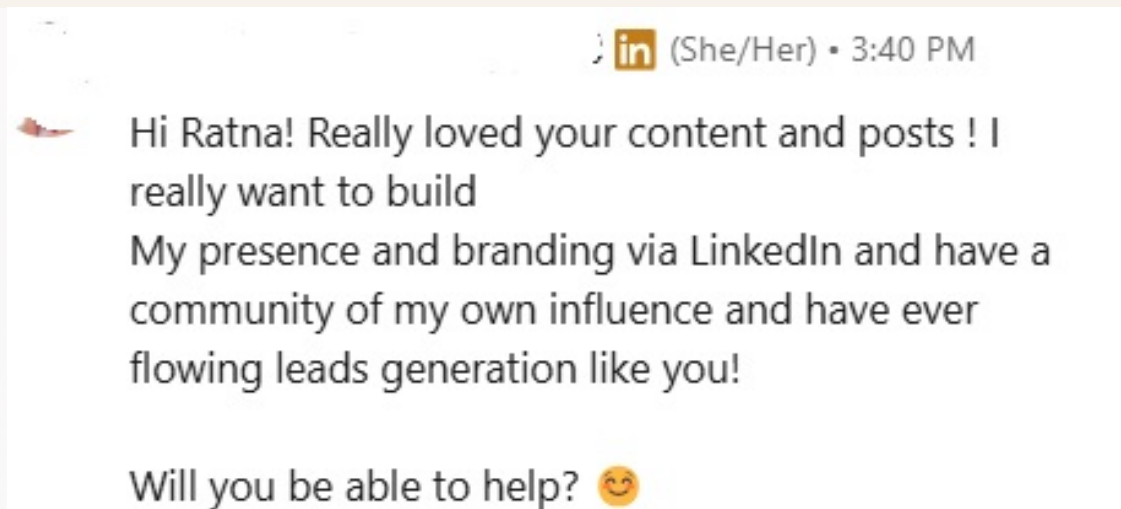
Let's unpack it:

Check out this post below!


[You are not for everyone, and that's okay!](#)

✓ What Happened Next?

- After this post, I received a few **consult calls within the same day.**
- A few people said they resonated with what I shared.
- 5 participants signed up for my upcoming **LinkedIn Personal Branding webinar.**



Why This Story Post Converted

Element	What It Did
 <i>Emotional Vulnerability</i>	Sharing about being a “recovering people pleaser” made it deeply relatable
 <i>Transformation Arc</i>	From fear and rejection → to trust and alignment = powerful positioning
 <i>Testimonial-Inspired</i>	The client quote shows organic attraction without the need to sell
 <i>Empowerment Message</i>	“You are worthy just the way you are” speaks directly to inner doubts
 <i>Soft Teaching Framework</i>	Clear mindset shift + tips = value-packed and memorable
 <i>Webinar CTA</i>	Low-pressure invitation that feels helpful, not pushy

04

The GEM Storytelling Formula

How to Share Your Story So People Remember You

If you've ever stared at your LinkedIn "About" section and thought, "What do I even say?" - I feel the same too when I get started.

Many advisors feel stuck. Often, profiles just list job titles or awards, and forget to tell the story that makes you stand out.

That's why I love the GEM Storybranding Formula. It's a simple template that helps you share who you really are, and why you do what you do, in just one short paragraph.

Here's the fill-in-the-blank template:

I help [who you help] who are struggling with [the main pain or challenge] because I know what it's like to [your personal "why" or experience]. Together, we [unique result or transformation you deliver], so that my clients can [what changes for them]. This is what drives me as I work towards [your big goals or aspirations].

Why Does This Work?

People connect with stories, not just a list of skills. When you talk about the pain your clients feel, and why you care, it feels real and relatable.

It shows you're not just another advisor - you're someone who truly understands and wants to help. This is the heart of a memorable personal brand.

How Can You Use This?

You don't need big words or a perfect story. Just be honest about **why you do what you do**, and how you help people. Even if you're just starting out, your **"WHY"** is powerful.

Here's how you can try it:

1. Think about your clients' biggest worry or pain.
2. Remember a moment in your own life that connects you to that feeling.
3. Write one or two sentences about the result you love delivering.
4. Tie it to your big dream, like reaching MDRT, COT, TOT - not just for the title, but so you can help more people.

05

“Visible Value” Action Step

How to Let Others Speak for Your Impact

Sometimes, it's hard to talk about yourself, right? But there's a simple, gentle way to show your value: let your clients speak for you. One honest sentence from someone you've helped can do more than a whole page of self-praise. People trust real words from real clients.

Here's What To Do

Step 1: Ask for a One-Sentence Testimonial

Don't overthink it. Just send a friendly message to a client you trust. Here's a script you can copy and tweak:

“Hi [Client's Name],

I hope you're well! I'm working to serve more people like you. If you have a moment, I'd be grateful if you could share one sentence about your experience with me? Just something simple that shows how I've helped you. Thank you so much, it means a lot to me!”

Most loyal clients are happy to help, especially if you keep it easy for them.

Step 2: Share It (LinkedIn)

When you get the testimonial, don't keep it hidden! Share it with your network. Here's how you might do it on LinkedIn:

Sample LinkedIn Update

Feeling grateful today. I recently asked a client what stood out about working with me, and she said:

"You made financial planning easy to understand, and I finally feel confident about my family's future."

This is why I do what I do. Thank you for trusting me with your journey.

If you want to chat about your own financial goals, I'm just a message away.

Why This Works

Simple, right? You're not bragging, you're just sharing the good you do be seen by others.

When people see real words from your clients, it feels honest and natural. It's not just you talking about yourself, someone else is saying, "Hey, this person truly helped me." That means a lot. People trust stories from other people, not just fancy titles or numbers.

A kind sentence from a happy client shows you care and that you make a real difference. It's like a friend recommending a good place to eat, you believe it more, because it's real and personal. These little stories help others feel safe to reach out to you, because they know you're genuine and helpful.

That's why sharing your clients' kind words can open new doors for you. It's simple, but it works because it's true.



06

The MDRT Network Multiplier

How Your Story Travels Further Than You Think

Do you ever feel like most of your referrals only come from people you already know, like your friends and family? Maybe you want to meet bigger clients or be introduced to people who really need your help, but you're not sure how to do it. I understand how that feels, I've been there too.

Here's some good news: when you build a personal brand that is honest and easy to remember, you don't need to rely on luck or keep asking your friends for help.

You can create what I call a "referral flywheel." This means people will start talking about you and recommending you, even if they've never worked with you before. This is how you get noticed by bigger clients and important people in the industry.

Try This: Help Your Network Spread Your Heart, Not Just Your Business Card

Tell Your Story So Others Can Tell It Too

Keep your message simple. Share why you do what you do and how you help people, not just your job title. When your story is clear, people can easily repeat it to others without getting confused.

Example: “I help parents feel confident about their children’s future because my own family struggled with planning. I want to make things easier for others.”

Stay Present — Even in Small Ways

Be present, even if it’s just with small posts or friendly comments. When people see you often, they remember you. This makes it more likely they’ll think of you when someone needs help—even if it’s a big client or a center of influence.

Appreciate and Celebrate Referrals

When someone introduces you or mentions your name—even if it feels small—thank them from the heart. People remember kindness. The more you appreciate your network, the more they’ll want to help you grow.

07

MDRT Metrics—How Your Personal Brand Speeds Up Your Numbers

Ever wonder if personal branding really makes a difference? From what I've seen (and experienced), when your brand tells your story, not just your job title – things change. Advisors with a visible, story-driven brand get 2–3x more inquiries and close deals 30% faster. Yep, it works.

Why? Because people connect with what feels real. When your story's out there, they trust you more—even before meeting you. That trust makes it easier to start conversations and close with less convincing.

Now, let's get practical and see where you are.

Why Tracking This Feels Different (and Gets Results)

When you track these numbers, you see your progress. Building your personal brand isn't just about feeling good, it's about seeing more people come to you, and helping your business grow faster. Even if your numbers feel small right now, they can grow quickly once you get your story out there.

Quick Worksheet: Where Are You Now, and Where Can You Go?

Step 1: Count your numbers

Grab a piece of paper (or your phone). For the past 30 days:

- How many referrals did you get? (People sent to you by others)
- How many inbound leads did you get? (People who messaged or called you because they saw your brand, post, or name somewhere, even if you didn't know them)

Add those up. That's your "Current Total Monthly Inbound."

Step 2: Calculate your efficiency ratio

Now, look at your total client meetings for the month. **Divide** the **number of inbound/referral leads** by your **total meetings**.

Example:

If you had 10 meetings, and 4 were inbound/referral, your efficiency ratio is $4/10$, or 40%.

Step 3: Set your 90-day goal

How many inbound/referral leads would make you feel excited in the next 90 days?

Don't worry about the "how" yet, just write down a number that feels like a next-level win for you.

08

Bonus—“Your Story, Your Stage” Social Post Challenge

Sometimes, all we need is a little push to finally share who we are. This is your moment to try it out for real, because taking action is where the real magic starts to happen.

Why This Challenge Is Worth It

When you talk about the real you, why you care, your highs and lows, and what truly matters to you – people really listen. They stop seeing you as just another “advisor” and start seeing you as a real person. That’s when you become someone they remember. That’s when new connections and real trust begin to grow.

Kickstart Your Posting Now!

1. Write a short intro post

Hop onto LinkedIn or your agency’s group. Share a little about who you are, what you care about, and why you help others. Keep your words simple. You don’t need fancy language or a perfect story. Just be real and true to yourself.

2. Tag me as your guide

Or tag whoever is helping you along this journey. This way, you'll get feedback, support, and maybe even a chance for a live review to help you do even better next time.

3. See what happens next

You'll be surprised—people notice. Some will comment, some might message you quietly. Sharing your story really does change the way people respond to you.

My Promise To You

If you take this step and post your story, I'll be here to support you and give honest, gentle feedback. Sometimes, all it takes is a little encouragement to get going. Who knows? This small step could be the start of something much bigger for your personal brand.

09

What's Next? Let's Keep Growing Together

You've made it this far, and I hope you're feeling proud of yourself! Sharing your story and building your brand isn't always easy, but every step you take opens new doors. If you're ready to get personal advice that's just for you, I'd love to help.

Your First LinkedIn Story Post

Writing your first story post doesn't have to be scary or complicated. Here's a simple process you can follow, featuring a real post from one of our clients, Angelina, [who shared an honest story about facing rejection and staying strong.](#)

✓ Read the analysis

1. Start With Why

💔 *"I Got Rejected Today. For the first time in a long while, a client's recommendation didn't close. And honestly? It broke me. For a couple of heartbeats."*

💔 I Got Rejected Today.

For the first time in a long while, a client's recommendation didn't close.

And honestly? It broke me. For a couple of heartbeats.

You immediately capture attention with a raw emotional moment. It sets the stage for why you're sharing this — not for sympathy, but to explore the deeper meaning behind a moment of rejection.

2. Name a Real Struggle

"I spent the entire weekend working on her portfolio... I gave it my all... And then, rejected."

"It was a close referral—someone who trusted me enough to recommend her."

I spent the entire weekend working on her portfolio, pouring over every detail to make it perfect. We spent 2 hours on Zoom after a face-to-face meeting the week before.

I gave it my all, heart and soul, just like I do with every client.

And then, rejected.

But this one stung deeper.
Because it wasn't just a random lead.

It was a close referral—someone who trusted me enough to recommend her.

You don't just talk about rejection generally—you share specific actions and effort that make this moment personal and painful. Then you anchor it deeper: this wasn't just a failed pitch, it was a trusted connection that didn't convert.

3. Show What You Learned

"👊 *Feel the Pain, But Don't Let It Break You...*"

"👊 *Remember Your Worth...*"

"👊 *Manage Your Emotions, But Don't Suppress Them...*"

👊 **Feel the Pain, But Don't Let It Break You**

Yes, rejection hurts. Let's not sugarcoat it. It hurts because we care so deeply. I gave everything, and it still wasn't enough this time.

👊 **Remember Your Worth**

It's easy to internalize a rejection and think, "What did I do wrong? Am I not good enough?" But that's not the truth.

👊 **Manage Your Emotions, But Don't Suppress Them**

I'll be honest, I felt like curling up and questioning everything I've built. But I've learned that emotions are temporary.

You transition from pain to power. You reflect, reframe, and offer lessons that show emotional maturity and growth. These are not fluffy takeaways – they're hard-won truths that came from experience.

4. Connect to Your Purpose

"Even when you've mastered your craft, even when you give everything, some things are beyond your control. What you can control is how you bounce back."

"Rejection isn't failure; it's a push to grow, to refine, and to come back stronger."

even when you've mastered your craft, even when you give everything,
some things are beyond your control.
What you *can* control is how you bounce back.

We all face rejection. The question is—how will you rise after the fall?

We need to remember that rejection isn't failure;
it's a push to grow, to refine, and to come back stronger.

Here you tie your story back to a bigger theme: resilience, growth, and leadership. You're not just telling your story, you're living your values through it.

5. Invite Others In

"Have you been knocked down recently? Let's talk about how we can turn those 'no's into our next big 'YES'."

"P.S. How do you handle rejection? Let's learn from each other. "

Have you been knocked down recently?
Let's talk about how we can turn those 'no's into our next big 'YES'.

p.s: How do you handle rejection? Let's learn from each other. ❤️

You end not with a mic drop, but with an open door. This makes it relatable, inclusive, and community-driven. You're saying: this is not just about me, it's about us.

Summary: Why This Post Went Viral

Element	Impact
<i>Vulnerable + Relatable Hook</i>	Instant emotional resonance, people stopped to read
<i>Story of Effort & Disappointment</i>	Triggered empathy + shared pain, deeply human experience
<i>Underdog Backstory</i>	Grit + growth = credibility and hope
<i>Framework with Takeaways</i>	Educates while inspiring, makes the post feel “valuable”
<i>Reframe into Empowerment</i>	Emotional shift gives readers courage
<i>Invitation, not Pitch</i>	Builds community, trust, and connection

How You Can Reuse This Formula

You can repurpose this format again and again. Here's the framework underneath it:

- 1. Open with a wound.**
- 2. Describe what you gave or risked.**
- 3. Show how it hurt.**
- 4. Revisit your past self (origin story).**
- 5. Teach 2–3 lessons or insights.**
- 6. Reframe with power + hope.**
- 7. End with a soft invitation.**

Quick Checklist Before You Post

Most loyal clients are happy to help, especially if you keep it easy for them.

- Did I use simple words that sound like me?
- Did I share a real moment or feeling?
- Did I include why I care about helping others?
- Did I invite others to join the conversation?

Remember, being real is always better than being perfect. The first step is just showing up and sharing your story, even if it's short and simple. You'll be surprised at how many people will connect with you just for being you.

If you need a little more support, I'm here to help you review your story and cheer you on. Let's make your first post the start of something amazing!

About Ratna Juita



Ratna Juita is a TEDx speaker, facilitator and coach. She empowers individuals and organisations to discover their inner gem so they can shine brightly and make a positive impact in their lives and community they serve.

Her mission is to empower leaders to build trust, influence, and unleash their full potential through Personal Branding. Co-author of *Women Empowered*, Ratna's transformative story of resilience and growth inspires others to embrace authenticity in their quest to build influence.

Trusted by global brands like AIA, Visa, and Grab, she helps Financial Service Leaders leverage LinkedIn to elevate their presence, attract opportunities, and accelerate business growth. Featured 3x by Channel News Asia and recognized as a LinkedIn Top Voice, Ratna supports individuals and team to establish credibility, expand networks, and scale their influence.

Let's hear what people say about working with Ratna



Angelina Joie Ang 洪夕然 · 1st

I empower you to protect what matters most - Your Family, Business, & Legacy. Ex-Banker | Freedom & Women's Empowerment Advocate | HNWI Wealth Strategist | MDRT Life & Honor Roll

January 13, 2024, Angelina Joie was Ratna's client

All LinkedIn members

On

After working with Ratna, my LinkedIn engagement grows 150%, impressions by 200%, and my post was highlighted by LinkedIn editor and scored more than 28000 impressions on that very day. And most importantly, I had expand my professional network too.

Had been working with many coaches along my journey in leadership and mental wellness journey. Ratna is one that pays special attention to my overall well-being and works hand in hand to my personal growth.



Lily Fung · 1st

Empowering corporate leaders and business owners for financial readiness in uncertain times | Certified High-Net-Worth Adviser | Ex-VP Finance | Unbiased Holistic Financial Planning | Tax-Efficient Wealth Transfer

April 27, 2024, Lily was Ratna's client

All LinkedIn members

On

This is my second encounter with Ratna - my first was at a session she co-hosted with Benjamin at LinkedIn's office, and today's webinar on personal branding via the LinkedIn platform reaffirmed my positive impression of her.

What sets Ratna apart is her humble demeanor. Despite being a LinkedIn Top Voice with an impressive number of followers, she remains down-to-earth, openly sharing her vulnerabilities and the challenges she's faced on her journey. This quality is crucial in a coach, as it allows her mentees to feel comfortable opening up to her.

Beyond her personality, Ratna has a deep knowledge of LinkedIn and offers practical insights on improving our online presence. She provides useful tips on creating effective content to strengthen our profiles.

Overall, I believe Ratna will make a good coach for anyone looking to enhance their personal branding on LinkedIn. If you're seeking guidance in this area, you couldn't ask for a better coach.

Are You Ready to Turn Your Story into Sales?

In this personalized session, we'll:

- ✓ Uncover your unique story that sells (without sounding salesy)
- ✓ Pinpoint the blockers stopping your ideal clients from finding you
- ✓ Map out your next bold LinkedIn move that positions you as the go-to expert

Book a One-on-One Consult

Sometimes, all you need is a personal chat to get clear on your next step. A private consult means we can really dig into your story, your strengths, and your goals.

We'll look at what's already working for you, where you might feel stuck, and how you can stand out even more in your own way.

This isn't a one-size-fits-all session. I'll help you find what's authentic for you, so you can start attracting the right clients with confidence.

Speak With Me 