

AI LinkedIn Profile Optimizer for **FINANCIAL ADVISORS**



Prompt 1 : Provide Context

Act as a LinkedIn Expert, optimize my LinkedIn profile. This will include a copy for my headline, background image, and about Section.

Before we begin, I want you to fully understand my career / business goals, so here are things that you need to know about me :

1. Name:
2. Your role:
3. Your target audience:
4. The problem I solve for my audience:
5. Keywords and phrases I would like to be associated with my profile :

Prompt 2 : The Headline Amplifier

In 14 words or less, can you give me 5 variations that I can use in my LinkedIn profile headline with the following formula :

I (Verb) + (Audience) to (Verb) + (Outcome)

Here are examples :

- I help professionals to optimize their investments and secure a financially stable retirement
- I guide entrepreneurs to build wealth and achieve long-term financial freedom
- I empower families to plan for the future and protect their financial legacy
- I support business owners to grow their assets and maximize tax efficiency
- I assist high-net-worth individuals to manage their portfolios and create generational wealth

Prompt 3 : Banner

Based on the context I provided, write a powerful business mission for my LinkedIn banner that is relevant and will capture the interest of (your target audience).

Make sure to include the keywords that I want to be associated with. Provide me with 5 variations.

Prompt 4 : About Section

Now, let's move on to the About Section. Write it based on the context I provided. Make sure to include the keywords that I want to be associated with. Provide me with 3 variations.

Write it in this format :

- What are the problems your Ideal Clients Profile is facing?
- What solutions can you provide?
- How can you support them in solving their problems?
- How can they reach you?

Prompt 5 : Content Ideas

Based on the above, generate 5 content pillars that can help me to build consistent and strong Personal Brand on LinkedIn

Prompt 6 : Content Ideation

Based on these 5 content pillars [list down your content pillars] and pain points of my Ideal Clients Profile, generate 10 content ideas to help me write captivating content to attract high quality leads.

Prompt 7: Authority Builder

Now that we've crafted a compelling LinkedIn profile, let's strengthen my personal brand as an authority in financial advising.

Based on my business goals and target audience, generate 5 unique ways I can position myself as a thought leader on LinkedIn.

Focus on strategies like sharing expertise, leveraging client testimonials, interacting with industry peers, and showcasing successful case studies. Be sure to highlight methods that will help me build credibility, trust, and authority within my niche.

Prompt 8: Thought Leadership Content

Generate 5 thought leadership post ideas that demonstrate my deep understanding of financial trends and market insights. These posts should position me as an expert in wealth management, highlight industry challenges, and offer actionable advice for my target audience (e.g., professionals, entrepreneurs, families, high-net-worth individuals).

Prompt 9: Client Success Story Framework

Help me craft a framework for sharing client success stories in a way that respects privacy but still demonstrates the tangible impact of my services.

Provide me with 3 different storytelling formats I can use to highlight how I've helped clients achieve specific financial goals (e.g., retirement planning, wealth building, tax efficiency).

Prompt 10: Engagement Booster

Suggest 5 ways I can interact with my LinkedIn network to increase engagement and attract potential leads. Focus on strategies like participating in LinkedIn discussions, responding to comments, asking insightful questions, and engaging with industry peers and influencers.

Provide examples of how I can add value in conversations related to finance, investments, and wealth management.

Ready to Unlock LinkedIn's True Potential and Attract Quality Leads Effortlessly?

I have 8 exclusive slots left for my personalized LinkedIn coaching, and once they're filled, my calendar will close.

You already know LinkedIn can be a game-changer for generating leads, but the question is: Are you leveraging it to its fullest?

I've helped Financial Advisors amplify their LinkedIn presence, not by doing more but by doing the right things—sharing authentic stories that resonate and building trust with the right audience.

Many Financial Advisors struggle with LinkedIn because:

- They spend hours posting without seeing any meaningful engagement
- They pour effort into content that doesn't connect or lead to conversations
- They miss the mark on telling stories that demonstrate their true value

Here's the thing – I know you don't want to waste your time. And neither do I.

That's why I'm offering a personalized LinkedIn Profile Optimization Call—where I'll dive deep into your personal and professional story to craft a tailored strategy that will make your profile stand out and attract your ideal clients.

Just like these people did:



Angelina Joie Ang 洪夕然  · 1st

I help to protect your Families, Businesses and Legacies | Ex-Banker | Financial Services Director | Freedom and Women Empowerment Movement | HNWI Private Wealth | MDRT Life & Honor Roll Member
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.

She gave structured ways of helping me towards my goals.

She initiated a couple of ingenious ways to help me regulate my thoughts and emotions along the way to ensure I stayed on course.

I look forward to every session with her and I'm impressed she's well prepared for every single session to cater to my growth.

Super looking forward to work with her and witnessing my supernatural growth in 2024! Thank you Ratna!



Lily Fung (Chartered Accountant, Million Dollar Round Table Qualifier) · 1st

Certified High-Net-Worth Adviser | Ex-Finance Senior Leader | Advisor to Senior Corporate Leaders & Business Owners | Unbiased Holistic Financial Planning | Tailor Structures For Tax-Efficient Wealth Transfer
April 27, 2024, Lily Fung (Chartered Accountant, 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.

Over the past few years, I've tested countless strategies, refined my approach, and achieved proven results—and I want to help you do the same.

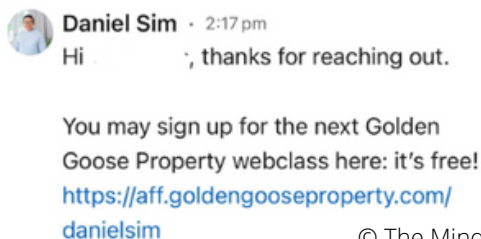
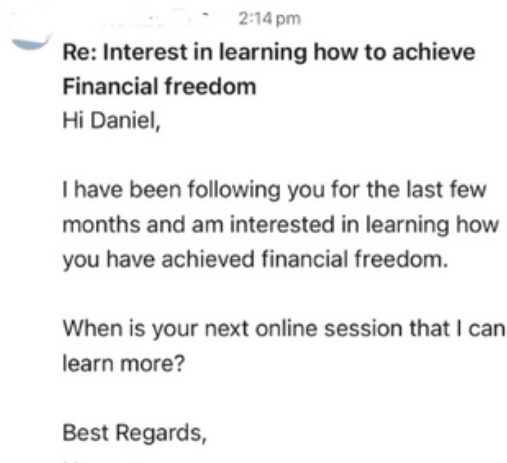
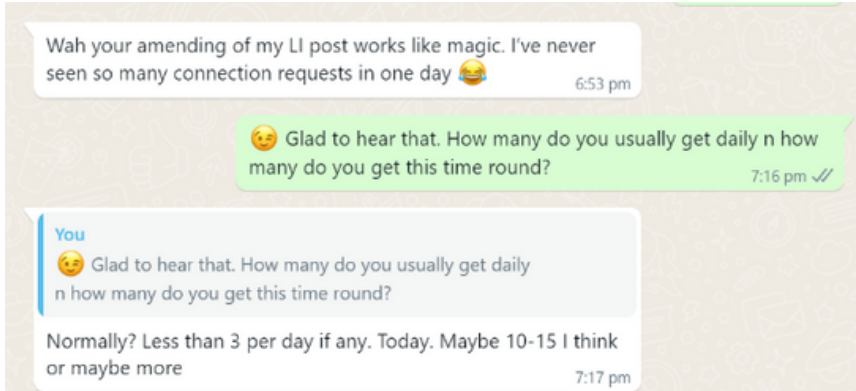
I met Daniel Sim when he reached out to me on LinkedIn.

He told me he is struggling to grow his followers and his content doesn't get the attention it deserves. He would like to grow his influence so that he can help more people to generate passive income.

As a successful property investor & educator, he knew that having a strong and credible profile would do him some good in reducing skepticism and resistance, while amplifying his thought leadership.

I have barely just started with him and recently tweaked his LinkedIn post.

- ✓ His post becomes best performing post.
- ✓ Suddenly he received 5x connection requests in a single day.
- ✓ Inbound leads came into his inbox!



It was a surprise to him.

But before you think this is a one hit wonder, how about Angelina Ang, a Financial Service Director.

When I first met her, she struggled to get engagement from her LinkedIn post, clueless not knowing what to post and how to make meaningful connections for her lead generation effort.

Today, she was featured not once or twice but 9x this year by LinkedIn editors! Her magnetic and insightful contents caught the eye of industry leaders, leading to numerous meaningful engagements and a reputation as a thought leader in her field.



Angelina Joie Ang 洪夕然 (She/Her) • 1st

I help to protect your Families, Businesses and Legacies | Ex-Banker | ...

[Book an appointment](#)

2w • 🌐



When can I Quit?

Crossroads perhaps? 🗝️ ...more



Get Hired by LinkedIn News Asia

60,343 followers

2w • 🌐

Are you planning to leave your job?

Choosing when and how to leave a position can be one of the ...more



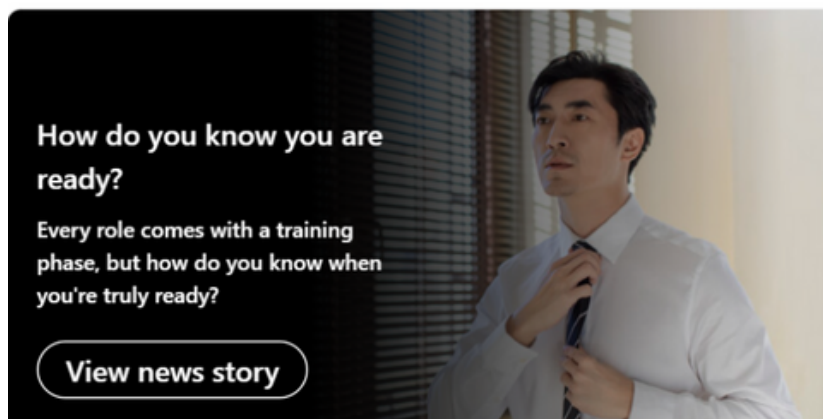
Angelina Joie Ang 洪夕然 (She/Her) • 1st

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Waking up to a fantastic Friday of this feature from [Adrian Tay](#) of [LinkedIn News Asia](#) ! ...more



Recently she is also listed #26 in Favikon Top Female Content Creators in Singapore



If Angelina can go from not knowing what to write to filling up her calendar with appointments, being lauded as a thought leader, wouldn't you think you can also do it too?

But let me be upfront.

This only works if you:

- Are ready to do the right kind of work (not just busy work).
- Believe in long-term growth over quick wins.
- Are already closing clients but know LinkedIn can unlock more opportunities.
- Are committed to building genuine, trust-based relationships, not just chasing followers.



Book a discovery call with me today to:

- Share your story, and let's uncover what makes you unique.
- Get a detailed diagnosis of how you can optimize your LinkedIn presence.
- Identify the content that will position you as a trusted authority and lead magnet.
- Walk away with actionable insights you can start using immediately.

If you find value in what we discuss, we can talk about how I can support you. I'm here to guide you every step of the way.

The time for guessing is over. It's time for LinkedIn to work for you.

BOOK NOW



***The best time to build your Personal Brand was yesterday. The second best time is today!
It's never too late.***

Let's Connect!



<https://www.linkedin.com/in/jratna/>



<https://www.instagram.com/jratna/>



[Watch my TEDx talk here!](#)



<https://themindgem.co/>

