



Just the Way You Are



ADVISORS ARE GROWING
THEIR DIGITAL PRESENCE
ACROSS **SOCIAL MEDIA**,
AND THE PACE IS
ACCELERATING, WITH
MORE ADVISORS
JOINING DAILY

IN A WORLD where staying connected and being found on social media is critical for connecting with clients and prospects, decisions about how to share messages that are authentic can sometimes be challenging. Whether you're experienced with social media or a recent adopter, you likely can benefit from exploring one advisor's successful strategy for developing a meaningful digital presence.

THE KASH EXPERIENCE

LPL advisor Kashif (Kash) Ahmed, CFP, of American Private Wealth in Bedford, Massachusetts, starts by sharing more than what the S&P 500 Index and Dow Jones Averages are up to. When Kash shares a message with his clients on social, he's providing insight into himself.

"There is more to me than being a financial planner and putting a portfolio together," explains Kash. "Connecting with people on a more personal level is important to me, and that resonates with my clients."

Follow Kash on Twitter (via @AmericanPWealth) and LinkedIn, and you'll find personal content you won't see anywhere else. Kash explains that he is a big believer in creating memorable experiences for his clients and his followers. His social strategy includes sharing



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KASHIF A. AHMED

a regular cadence of pictures from his travels, commentary on current events, and photos of his culinary adventures at home.

Kash also draws from his 20 years as a professor of finance, making connections to lifelong learning and sharing his global and U.S. academic experience. On the business side, Kash shares LPL Research podcasts and insights, and, importantly, includes his own take.

“Generating my own content and sharing my point of view is important,” Kash says. “If I didn’t add my two cents, my clients would not read it, and who could blame them?”

Kash’s social strategy is focused on providing a consistent, repeatable experience for his clients. “People know where I stand as a person, what’s ticking inside my head, what I think, and who I am. And that’s important,” he says. “I want my clients to know who this guy is, working on their behalf.”

MEANINGFUL CONNECTIONS

His approach works. It’s not uncommon for a client to visit Kash’s office wanting to discuss overseas adventures months after Kash shared a story about his journey. Just recently, a fellow professor asked Kash what he’s been cooking on the weekends, remembering a post from months earlier of him wearing an apron in his kitchen.

At LPL’s Home Office, Managing Director Burt White always greets Kash as “Papa Bear” and asks about his “cubs” because, as Kash explains, online he has always referred to his children as “my cubs.” Burt has seen these references on Twitter. These personal connection points are critical for Kash.

“Ultimately, clients don’t connect with a profile, they connect with a person,” he says. “And your digital activities throughout the day define who you are.”

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THE DIGITAL YOU

LPL UNDERSTANDS that creating an authentic digital presence is important, and we can help. Here are some suggestions to support your efforts:

FOLLOW and connect with LPL advisors. LPL advisors incorporate many digital best practices that can be adopted across Twitter, LinkedIn, and Facebook. Connect with the advisors featured in *LPL Magazine*, and follow up with advisors you’re meeting at LPL conferences throughout the year. Notice how they communicate with their followers and share information.

SUBSCRIBE to LPL’s social media content library. Every day, LPL posts articles, charts, and blogs that can be shared along with your own messages. The library is easy to use and prioritizes simple solutions for content sharing.

VISIT LPL Research’s House of Charts regularly. Each chart in the House of Charts has a message that helps tell the story of the markets, the economy, and investments. You can share charts with your clients directly from this website, and you might highlight or expand on our messages.

SCHEDULE a marketing consultation. Meet with an LPL Marketing Solutions Center consultant, and review your digital presence in detail, including what’s working and what can be improved.

