

Creating a Business Page on LinkedIn

Social media outlets offer an effective way to increase existing client touches and prospect new clients.

All too often, advisors view social media as a box they have to check off because that's just what everyone does, right? But effective marketing on social media is so much more than that.

It all comes down to connecting with people – and sometimes even other network connections.

This training document explains how to create a business page on LinkedIn.

LinkedIn Company Account Requirements

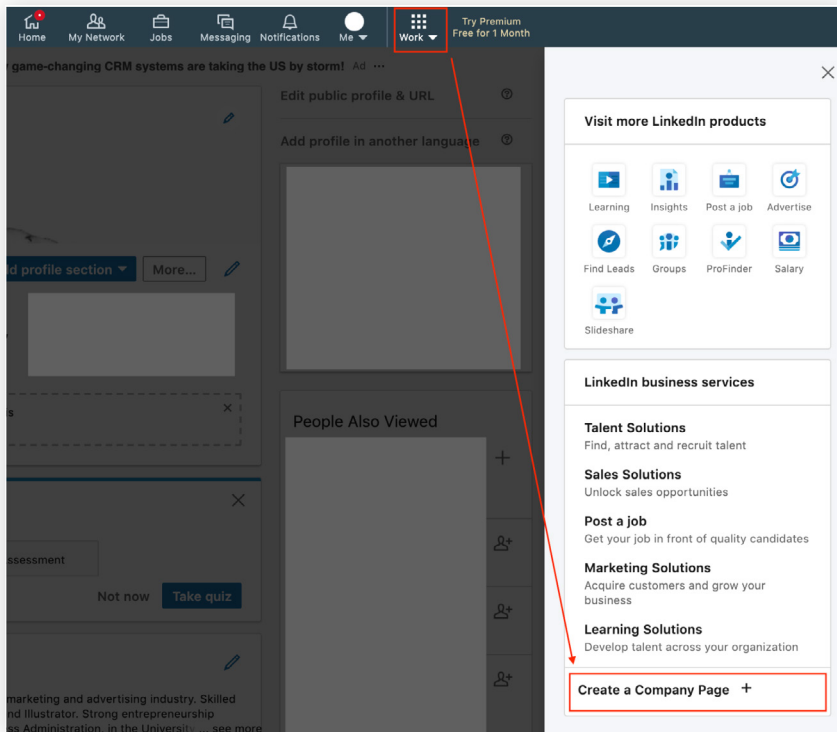
Before creating your company page, make sure you meet the following **LinkedIn requirements**:

- » Ensure a Page doesn't currently exist for your organization.
- » Create a LinkedIn profile with your real first and last name.
- » Confirm the email address associated with your LinkedIn account.
- » Build your professional network to ensure you have enough connections.

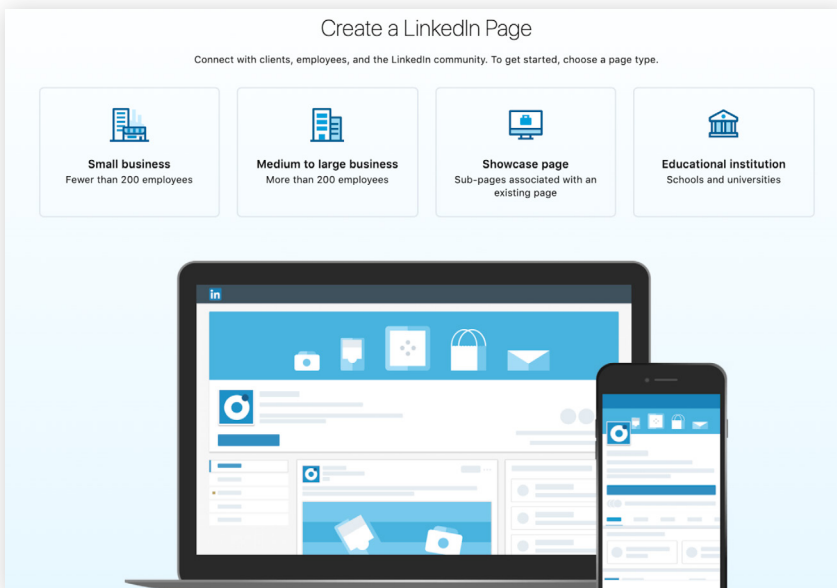
Create your Company Account

In order to establish a company LinkedIn account, you must first have a personal LinkedIn account. Once the personal account is in place, follow the steps below to create your company account.

- 1 Login to your personal LinkedIn account, then select “Create a Company Page” under the “Work” menu.



- 2 Select the size of your business.
- 3 Enter your company name, preferred LinkedIn URL, website, company details, square company logo and tagline.



- 4 Check to verify that you are an official representative of the company and have the right to act on behalf of the company in creation of the page.

The screenshot shows the LinkedIn 'Let's get started' form for creating a company page. The form is titled 'Let's get started with a few details about your company.' and includes a sub-header '* indicates required'. The form is divided into three main sections: 'Page identity', 'Company details', and 'Profile details'. The 'Page identity' section includes fields for 'Name', 'LinkedIn public URL', and 'Website'. The 'Company details' section includes dropdown menus for 'Industry', 'Company size', and 'Company type'. The 'Profile details' section includes a 'Logo' upload area with a 'Choose file' button and a 'Tagline' field. A 'Page preview' section on the right shows a preview of the company page layout. At the bottom, there is a checkbox for 'I verify that I am an authorized representative of this organization and have the right to act on its behalf in the creation and management of this page. The organization and I agree to the additional terms for Pages.' and a 'Create page' button.

- 5 Click to "Continue".

Complete Your Company Profile

Always complete your profile because **"pages with complete information get 30% more weekly views."** Remember to:

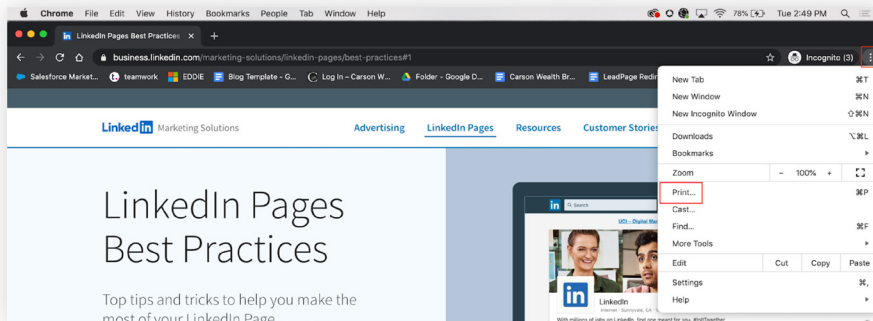
- » Include a detailed description of your firm along with the required disclosure. Click here to learn more about required disclosures and other social media compliance. requirements.
- » Complete the required fields on the right side of the page further explaining your company.
- » Fill in your "Overview" based on the core service offerings of your firm.
- » Set up a call-to-action button
- » "Publish" your company profile.

Submit your LinkedIn Account to Compliance for Approval

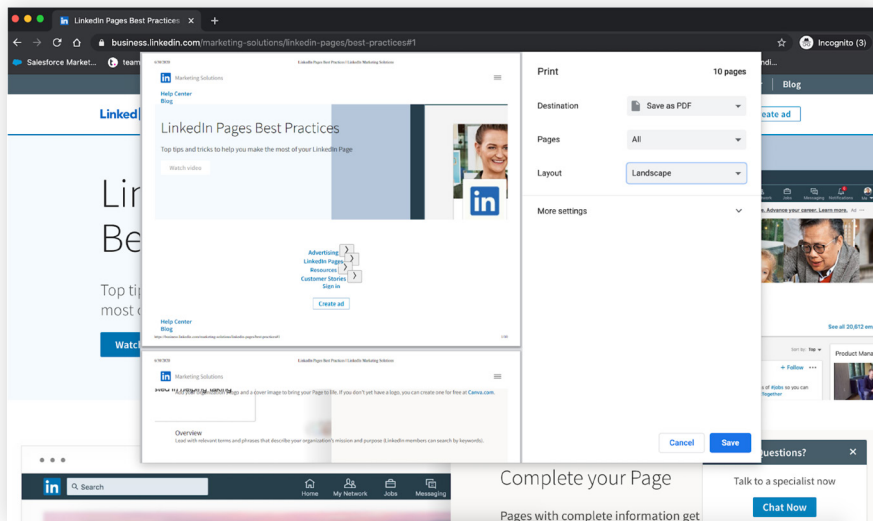
If you need to submit your page to compliance for approval, whether it's an in-house compliance team, broker-dealer or archiving solution, you may need a PDF.

To generate a PDF of your LinkedIn account:

- 1 Navigate to your LinkedIn home page
- 2 Click "Print" from your browser. The location of the print option varies from browser to browser, this document displays the location in Chrome.



- 3 Choose the "Save as PDF" option and save the document to your local machine.



- 4 Submit the PDF to compliance.

Once your profile has been approved, you can begin making updates to your company page. Click the "Follow" button in the upper right corner of your company profile to follow the page. Encourage your LinkedIn connections to do the same by sharing the link on your personal LinkedIn account!