

Bio Template

Please answer the following questions for your bio. Our messaging is very benefit-driven (less about us and more about what clients can gain from choosing **our Company**). Please keep this goal in mind when writing your bio. Third person is preferred.

How do you add value for our clients at **our Company**?

Background

Provide information on your education, work history, industry memberships, and awards or recognition you've received.

Passions

Family, what do you like to do, hobbies, etc.

Favorites (please answer a minimum of three)

- » Favorite food
- » Best piece of financial advice you've received
- » Favorite quote
- » If I could meet anyone, past or present, it would be...
- » Hidden talent/skills
- » Favorite book
- » Favorite movie or TV show
- » What motivates you
- » Favorite holiday
- » Name something on your bucket list
- » Place you'd most like to visit
- » Biggest accomplishment