

Unlocking the power of LinkedIn

A how-to guide for retirement plan advisors to help evolve your practice.

LinkedIn leads the way

A social media platform for professionals, LinkedIn has become the most-used social media tool among advisors.

Why use LinkedIn to discuss lifetime income?



Stay connected with plan sponsors who are prioritizing retirement income

There is real opportunity for advisors to engage with clients by sharing insights on LinkedIn.



Grow your practice by reaching prospects

The majority of financial planners who use social media for business report that it has helped get new clients — and most have had success with LinkedIn.

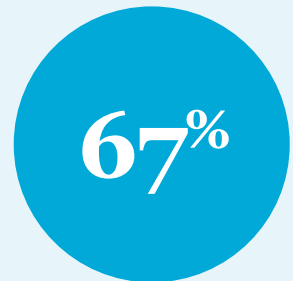


Add value by educating young participants

Three-fourths of LinkedIn users are between ages 18–34;¹ informing this group about retirement savings would add value in the eyes of plan sponsors.



of financial advisors use LinkedIn as a marketing tool.²



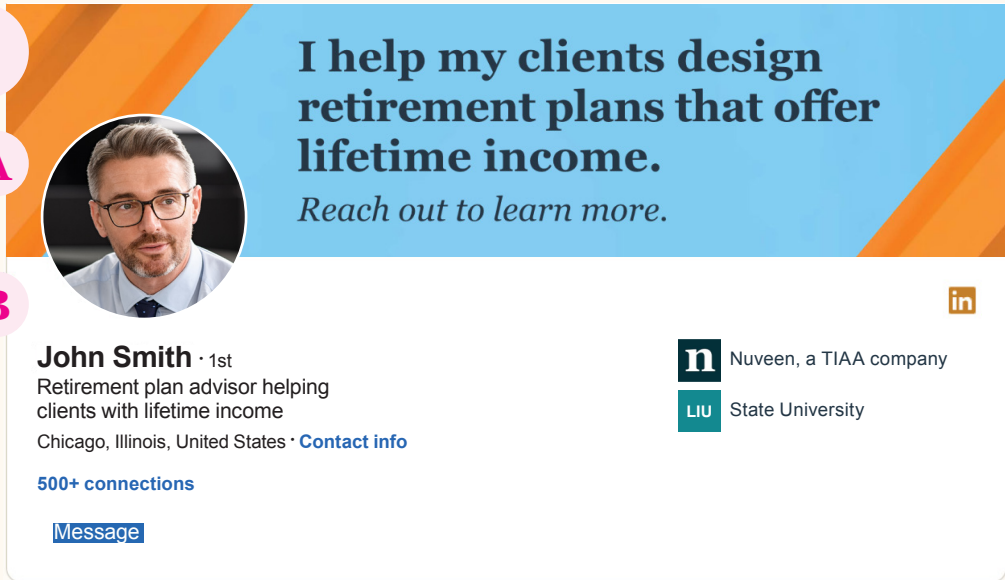
of advisors who say social media has helped get a new client specified that LinkedIn helped them get a lead that became a client.³

LinkedIn profile layout

1

A

B



I help my clients design retirement plans that offer lifetime income.
Reach out to learn more.

John Smith · 1st
Retirement plan advisor helping clients with lifetime income
Chicago, Illinois, United States · [Contact info](#)

500+ connections
[Message](#)

n Nuveen, a TIAA company
LIU State University

C

About

I am a retirement plan advisor with 20+ years of industry experience. According to Nuveen's 2023 EQUilibrium survey, 54% of plan sponsors expect to add a lifetime income solution to their retirement plans in the next two years.⁴ I am passionate about helping my clients design retirement plans that offer lifetime income. Please reach out to learn more.

D

Featured [See all](#) < >

How can the retirement industry solve the core challenges affecting retirement security? We look toward TIAA's Retirement Bill of Rights to provide the blueprint in our new ...see more

Securing retirement in America

next advisor

24,671 · 759 comments

Evaluating different product offerings remains a challenge when implementing lifetime income solutions but retirement plan advisors are there to help. Learn more in our new ...see more

LIFETIME INCOME: Getting to implementation

next advisor

251 · 46 comments

As more plan sponsors seek a guarantee to create secure retirements for working their plan advisor for help. Nuveen's E

BROADRIDGE 360 ADVISOR SU

What plan sponsors need to know about lifetime income

May 20, 2024 | 11 a.m. – JW Marriott | Austin, Texas

nuveen
A TIAA Company

549 · 51 comments

LinkedIn best practices

Express yourself in your profile

1. **Showcase your expertise, achievements and professional journey in your LinkedIn profile. The list below will get you started in creating (or revising) a profile that sets you apart.**
 - A. **Photo:** Your headshot should be clear, well lit and feature you in professional attire.
 - B. **Headline:** State your role and include your value proposition. It's often the first thing people see, so make your headline compelling.
 - C. **Detailed "About" section:** Go beyond your resumé to provide more about your services, approach and professional philosophy.
 - D. **Featured section:** Showcase your skills and experience by featuring posts that you've authored, articles you've published and any external media coverage.
 - E. **Experience and education:** Include all pertinent details and include what you accomplished and the impact you made.
 - F. **Licenses & certifications:** Showcase your knowledge and professional achievements.

Create and share for impact

1. **Make it meaningful**
Your audience is more likely to engage if you provide something of value. For example, a plan sponsor considering lifetime income solutions may appreciate you sharing a primer on the topic.
2. **Use media to support the message**
LinkedIn supports a range of deliverables, allowing you to provide content in the most effective way.
 - **Articles and documents:** share in-depth insights in long-form content.
 - **Images:** grab attention and make a point quickly with images or infographics.
 - **Videos:** convey complex ideas in a digestible format.
 - **Text:** share thoughts, ask questions or start discussions in a quick and easy way.

E Experience



Nuveen

4 yrs 3 mos

Senior Retirement Plan Advisor

Full-time

Mar 2021 – Present · 3 mos

Independently manage the strategic planning, consulting, guidance, marketing, investment analysis and servicing of assigned book of 401(k) retirement plans.

Retirement Plan Advisor

April 2019 – Mar 2021 · 2 yrs

Built and serviced a practice of retirement plan clients including, plan sponsors, fiduciaries, key executives and plan participants – to include 401(k), 403(b) and defined benefit plans.

Show 7 more experiences ▾

E Education



State University

Bachelor of Arts, Business

Student Commencement Speaker

F Licenses & certifications



Retirement Income for 401(k) Plans (RI(k)™) Certificate Course

National Association of Plan Advisors'



Series 7

FINRA

Show more ▾

Use the features of LinkedIn

Advisors should take advantage of LinkedIn technology to amplify the impact of their posts.

1. Include keywords

- Make your content broadly searchable by including the most relevant terms, like “lifetime income,” in your post.

2. Add tags

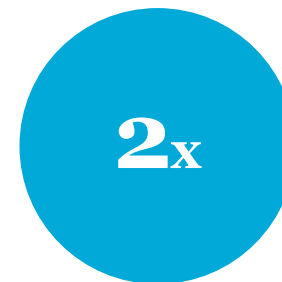
- Create connections and increase visibility by using @ before names of people and organizations; use the hashtag (#) before important words and phrases.

3. Sponsor posts

- Get your post in front of exactly who you want by paying to have it added to your target audience's feed.

4. Use analytics

- Understand the relevance and quality of your posts by tracking their engagement using built-in LinkedIn tools.



LinkedIn posts published with images can generate **twice the engagement rate** as text-only posts.⁵

Stay connected

Over 67 million companies are listed on LinkedIn,⁶ so there are endless opportunities to connect and build your network of clients, prospects and others in the industry.

Engage!

Reacting to posts from those in your network helps you stay connected while increasing your visibility in their networks.

1. Like/react

Show how you feel about a post with one-click responses



2. Repost

Share someone else's post with your network



3. Comment

Write a response to another's post (e.g., "Congrats!" or "Thanks for sharing.")



Don't be shy

There are countless LinkedIn groups that bring likeminded individuals together to share insights and learn from other professionals on a topic. Look for groups related to investing, financial advising, retirement or lifetime income—or create your own and invite others to join.

[Visit nuveen.com/LifetimeIncomeInfluencer](https://nuveen.com/LifetimeIncomeInfluencer) to learn more.

Endnotes

1 Source: Statista, 2024. <https://www.statista.com/statistics/273505/global-linkedin-age-group/>

2 Source: SmartAsset, 2023. <https://smartasset.com/data-studies/financial-advisor-marketing-strategies-2022>

3 https://www.broadridge.com/advisor/docs/wm_bas_financial-advisor-playbook-2023.pdf

4 Nuveen 2023 Equilibrium Global Institutional Investor survey

5 Source: LinkedIn. <https://www.linkedin.com/pulse/important-linkedin-statistics-data-trends-oleksii-bondar-pqlie/>

6 Source: Kinsta. <https://kinsta.com/blog/linkedin-statistics>

Disclosures

Nothing discussed or suggested in these materials should be construed as permission to supersede or circumvent your companies policies, procedures, rules, and guidelines.

There is no guarantee that utilization of any of this content will result in increased business.

Lifetime income typically refers to a payment option, the payments are backed by the claims paying abilities of the issuing company.

All information has been obtained from sources believed to be reliable, but its accuracy is not guaranteed.

There is no representation or warranty as to the current accuracy, reliability or completeness of, nor liability for, decisions based on such information and it should not be relied on as such.

The views and opinions expressed are for informational and educational purposes only as of the date of production/writing and may change without notice at any time. Any changes to assumptions that may have been made in preparing this material could have a material impact on the information presented herein by way of example. **Past performance is no guarantee of future results.** Investing involves risk; principal loss is possible.

This material is not intended to be a recommendation or investment advice, does not constitute a solicitation to buy, sell or hold a security or an investment strategy, and is not provided in a fiduciary capacity. The information provided does not take into account the specific objectives or circumstances of any particular investor, or suggest any specific course of action. Investment decisions should be made based on an investor's objectives and circumstances and in consultation with his or her financial professionals.

Please note that this information should not replace a client's consultation with a tax professional regarding their tax situation. Nuveen is not a tax advisor. Clients should consult their professional advisors before making any tax or investment decisions.

Nuveen, LLC provides investment solutions through its investment specialists.

Please note that this information should not replace a client's consultation with a tax professional regarding their tax situation. Nuveen is not a tax advisor. Clients should consult their professional advisors before making any tax or investment decisions.

Nuveen, LLC provides investment solutions through its investment specialists.