

FPA  
NorCal  
Conference



# How to Engage on LinkedIn... Like a Real Person

Jodi Morris, CFA, CFP®

*June 1, 2022*



Connecting Growth Globally



---

# Reasons Advisors May Avoid Engaging on LinkedIn

---

I don't want to appear salesy or overly promotional

I want to keep my personal and work life separate

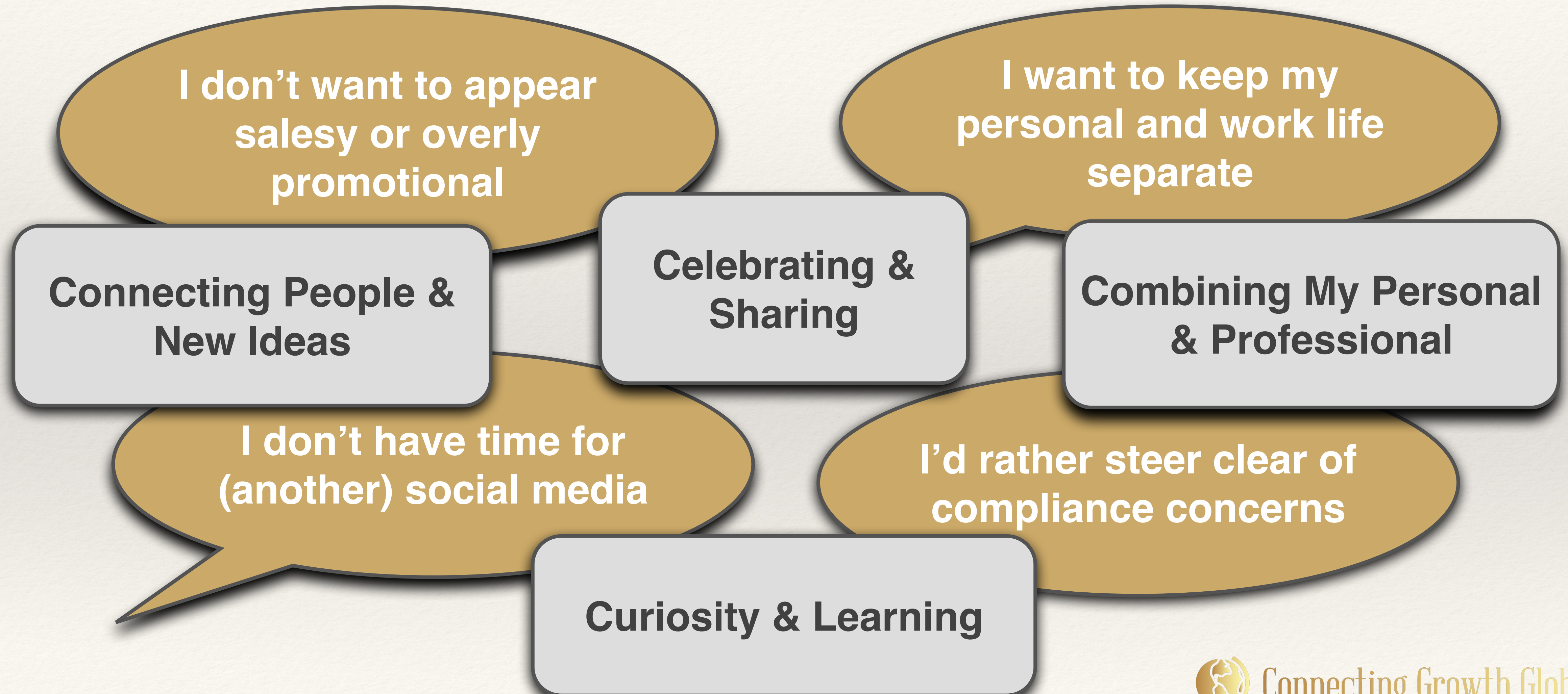
I don't have time for (another) social media

I'd rather steer clear of compliance concerns





# What Made Me Successful In Real Life





---

# Let's Start With WHY (Then What)

---



## *TODAY'S FOCUS:*

- ❖ **Showcasing You:** Values, Strengths, Aspirations
- ❖ **Networking:** Who and How to Connect
- ❖ **Ongoing Engagement** with your Network
- ❖ **Engaging Q&A**

“People don’t buy what you do;  
they buy why you do it. And what  
you do simply proves what you  
believe.”

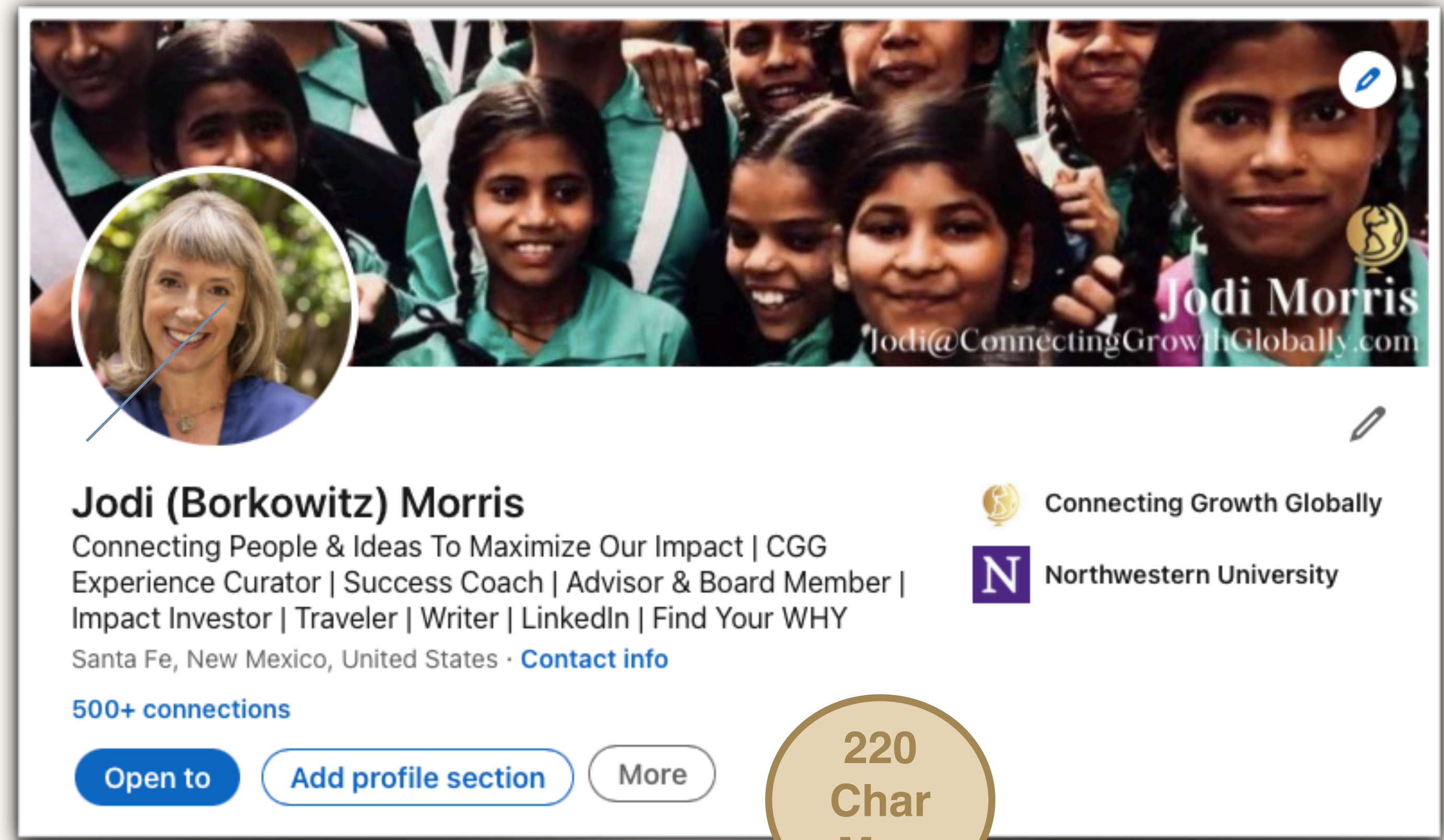
—*Simon Sinek*



# Showcase You: Values, Strengths, Aspirations

- ❖ Descriptive LinkedIn Heading (Why | What | How)
- ❖ Main & Background Photos (Pictures tell a story)
- ❖ **WHY?** Feeds into Google search & other LinkedIn tools

*THINK MARKETING*



**Jodi (Borkowitz) Morris**  
Connecting People & Ideas To Maximize Our Impact | CGG  
Experience Curator | Success Coach | Advisor & Board Member |  
Impact Investor | Traveler | Writer | LinkedIn | Find Your WHY  
Santa Fe, New Mexico, United States · [Contact info](#)  
500+ connections

Connecting Growth Globally  
Northwestern University

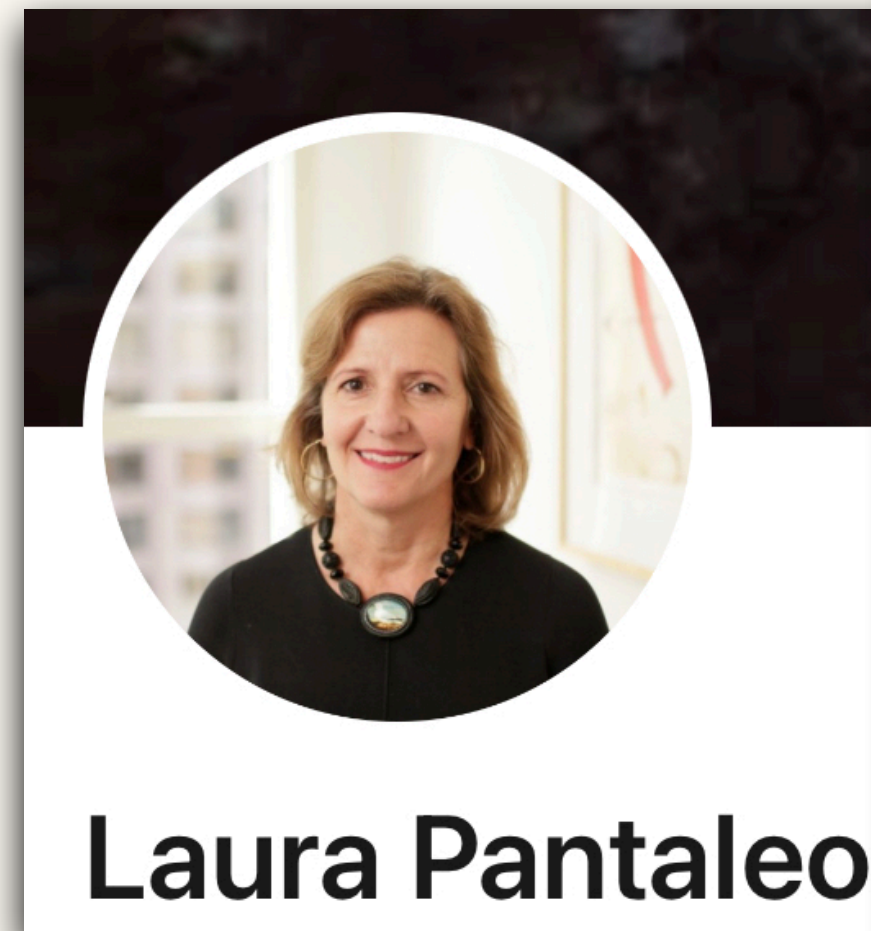
Open to Add profile section More

220 Char Max



# Showcase You: Values, Strengths, Aspirations

- ❖ Why, What & How **About** (first-person story, not bio)
- ❖ **Easy Format:**
  - ❖ What do you *believe*?
  - ❖ What *stories* from your past link to what you do now?
  - ❖ What do you do now (& *why*)?
  - ❖ Suggested action step



2000  
Char  
Max

## About

Financial decisions are rarely simply about money. They reflect our life priorities. The most meaningful part of my job as a wealth manager is working hand in hand with clients to find solutions that support the life they want to lead.

Growing up as a competitive swimmer in Canada, I brought an athlete's rigor to the first stage of my investment career. Trained as a financial analyst at Burns Fry in Toronto and Jurika & Voyles in Oakland, I then spent a successful tenure at Seneca Capital Management. I excelled in a high-stress environment, selecting investments for institutional client portfolios. To reward my contributions for building the firm from early in its life to \$14 billion in assets under management, I was made a partner after only 4 years.

When I met the team at Wetherby in 2017, I knew I found the unique, inclusive culture I'd been seeking my entire career. We are a competitive team together and not against each other. We are partners with our clients and have their best interests at heart. I relish



# Showcase You: Values, Strengths, Aspirations

- ❖ Highlight Expertise in Features (web link, LinkedIn post, video)
- ❖ Add context to Experience, Education & Volunteer
- ❖ One-line descriptor of firm
- ❖ What you do/did
- ❖ Attach media

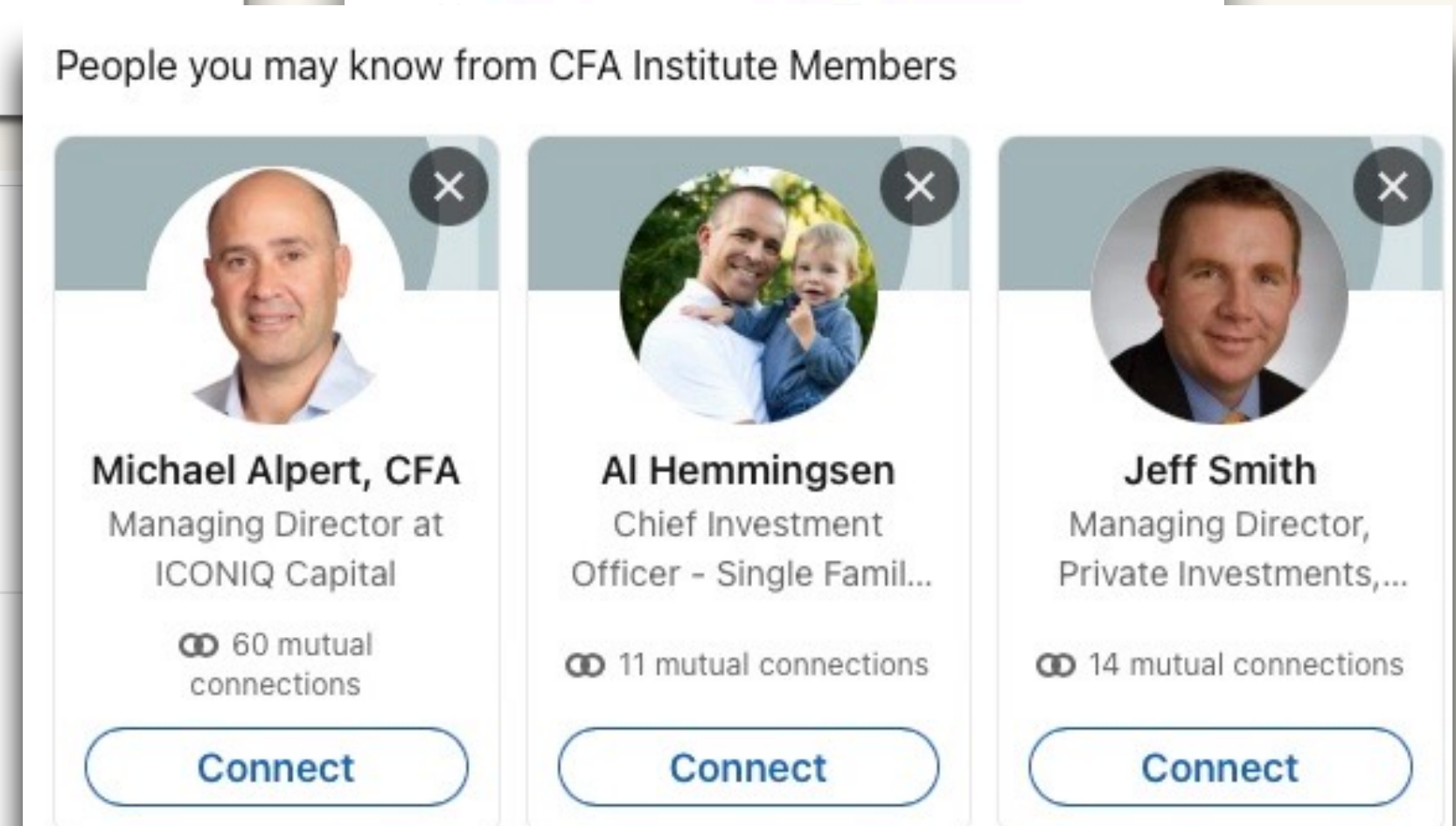
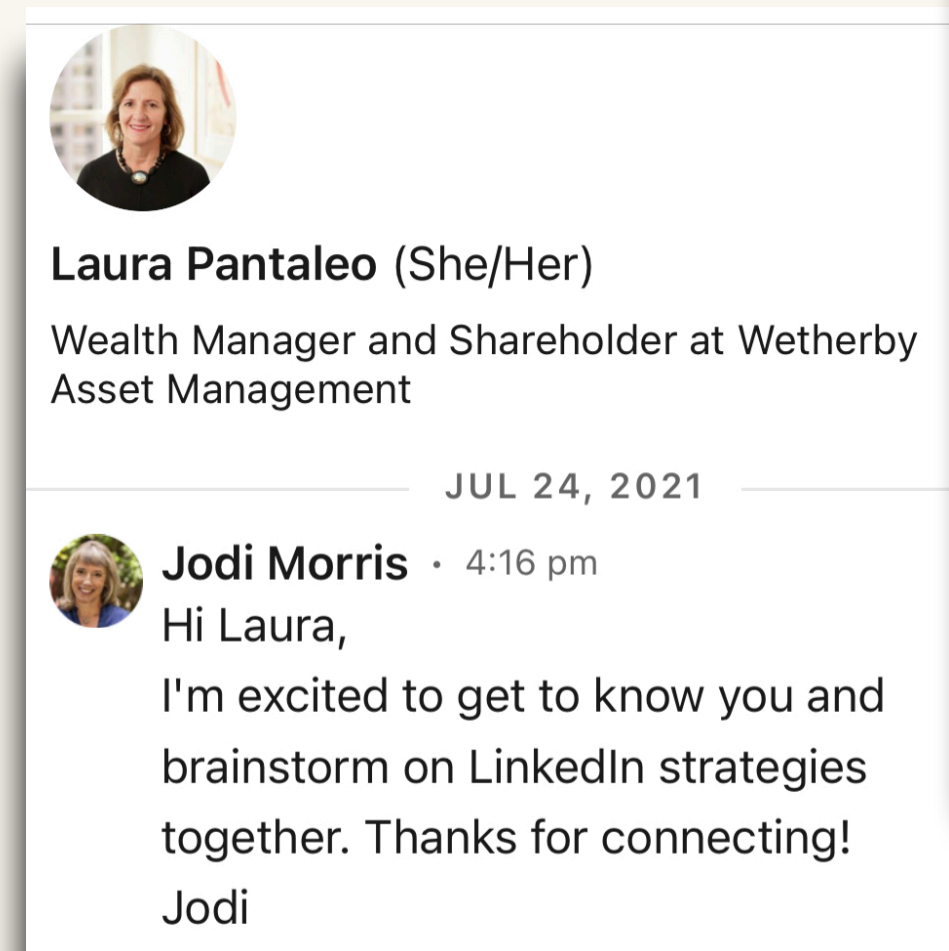
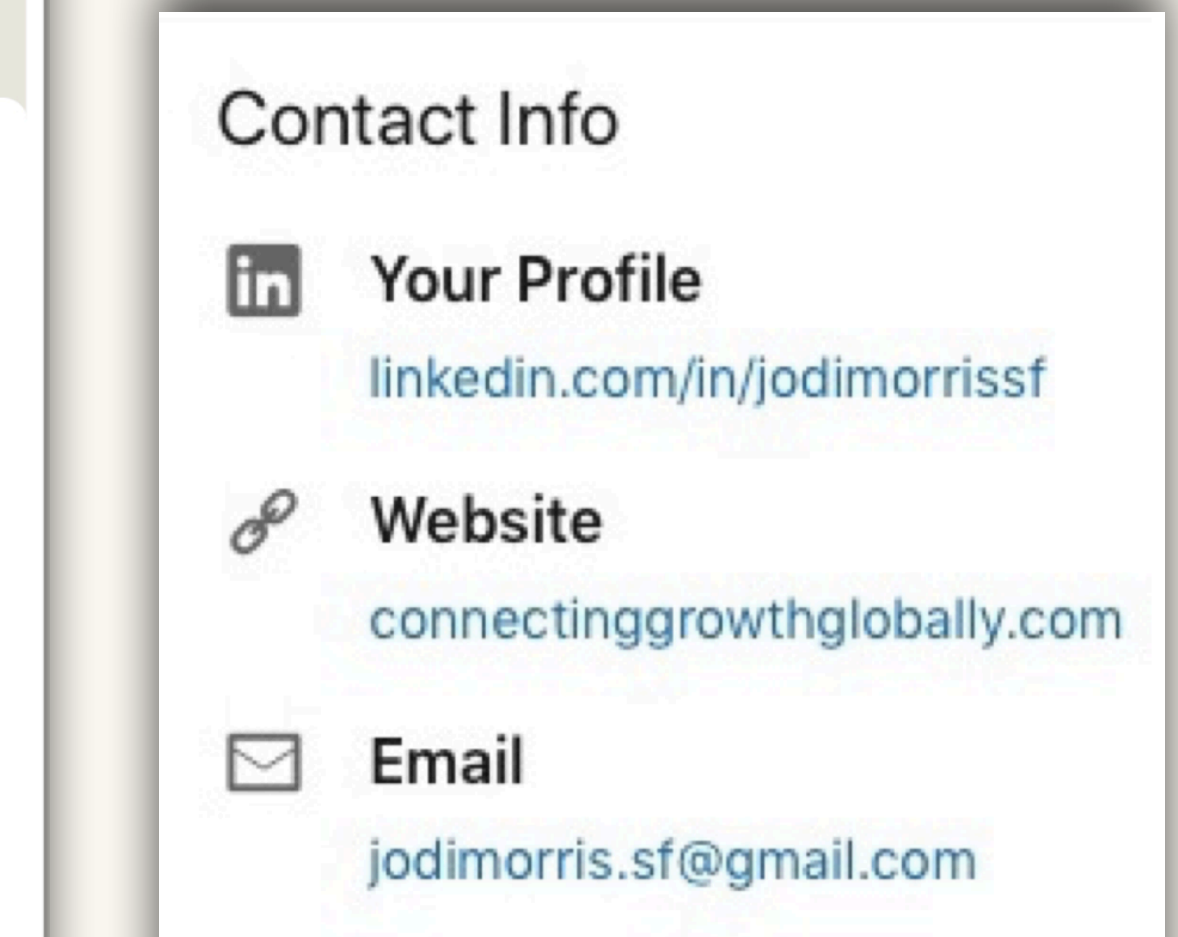
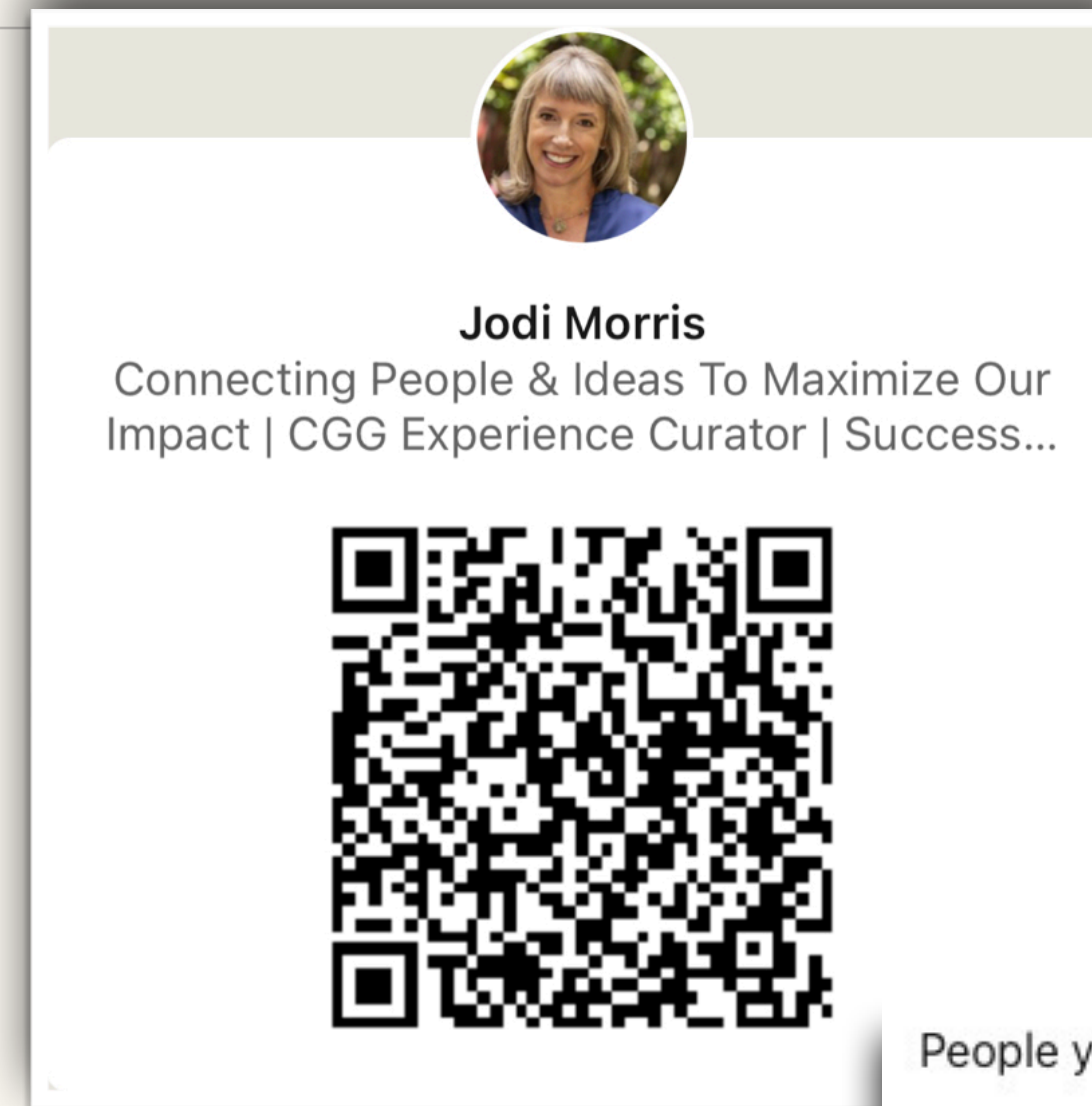
The screenshot displays a LinkedIn profile with the following sections:

- Featured:** Three featured items are shown, each with a "Link" label and a thumbnail image. The first item is a video of Jodi Morris. The second is a quote by Warren Buffett: "The best investment you can make is in yourself." The third is a video of Jodi Morris speaking at a podium.
- Experience:** The first entry is for "Founder & CEO" of "Connecting Growth Globally" (Aug 2014 - Present, 7 yrs 9 m), located in the San Francisco Bay Area. The description states: "I curate CGG Experiences that go beyond standard tourism to explore future economic, social and cultural trends. The intimate, small-group experience challenges each of...". Below the text are four small media thumbnails: a group of people, a woman on a boat, the Warren Buffett quote, and a "TOP ADVISOR MARKETING PODCAST" logo.
- Education:** The entry is for "President, IWF Northern California Legacy Foundation" (International Women's Forum, Feb 2014 - Jan 2021, 7 yrs) in San Francisco. The description reads: "International Women's Forum (IWF) is an invitation-only global forum connecting women leaders across every professional sector in support of advancing women's leadership and championing equ: ...see more". Below the text is a thumbnail for the "IWF NorCal Legacy Foundation - Blog" with the text "Jodi Morris, President (2019-2020)".



# Networking: Who and How to Connect

- ❖ Bring **LinkedIn** to real life networking (ditch business card, hyperlinks in intro emails, email signature)
- ❖ Update your **Contact Info** (vanity URL)
- ❖ Use **LinkedIn AI** to help manage & grow your network
- ❖ **Connect with:** Colleagues, Clients, Vendors, Family, Friends, University, Personal Connections
- ❖ **LinkedIn Message** (always include Connection request)





---

# A Bit About the LinkedIn Algorithm...

---

## *LINKEDIN PRIORITIZES IN YOUR FEED:*

- ❖ **Posts from users you've engaged with who post consistently** (means you have some control over whose posts you see)
- ❖ **Content from overall high engagement users** (means the more you engage, the more people who see your posts)
- ❖ **Posts with longer comments** (quality > quantity)
- ❖ **Original content** (commentary, photo & video shared directly on LinkedIn)

*THE LESSON? ENGAGE, BUT ENGAGE THOUGHTFULLY*



# Ongoing Engagement: Extension of Real Life

- ❖ Engage with Others' Posts (Likes, Comments, Reshares)
- ❖ Thoughtfully Share Own Posts (Articles, Photos, Videos)
- ❖ LinkedIn Prefers Original Content (vs. links to external sites)
- ❖ Tag People & Companies & Use Hashtags (#FPANorCal)
- ❖ Engage with Comments



The image shows a screenshot of a LinkedIn post from Carrie Schwab-Pomerantz, President & Board Chair at Charles Schwab Foundation. The post includes a profile picture, name, title, and a text snippet: "Taking on a leadership position of any kind can be challenging and sometimes even intimidating. I felt this firsthand when asked by Boys & ...see more". Below the text is a "Ask Carrie" button and a photo of Carrie sitting on a couch, smiling, holding a red mallet and a blue box. At the bottom of the screenshot, the title of an article is visible: "My Dream Gig Has Come True—What I've Learned" by Carrie Schwab-Pomerantz on LinkedIn, with a 7-minute read time. The start of the article text is also visible: "There is no question that I have been extremely fortunate to meet and collaborate with talented and inspiring people..."

A Real Person Post

Original Content (Article)

Tags Company

Reshares Comments Likes

Engages in Comments





# Ongoing Engagement: What To Post About?

Inspiring Author/Book/Film

Celebrating Anniversary or  
Another's Achievement

Honoring Holiday/Month

In-Office Photo

**Don't Forget to  
Include Your WHY  
Story**

Article Related to Your Focus  
(College Saving, Gifting, Taxes,  
ESG Investing)

Life/Leadership Lesson

First In-Person Conference

Non-Profit or Volunteering





# Ongoing Engagement: The Easiest Way to Start?

## RESHARE COMPANY POSTS, ARTICLES, VIDEOS

- ❖ Resharing Company Posts  
(Ties to firm philosophy + adds personal voice)
- ❖ Sharing Article/Video with  
WHY Story (Personal story key)

**Mark T. Johnsen** · 1st  
CEO & Founder  
1yr · Edited · 🌐

I wish every child in America could hear this speech from MLK. Thank you for your inspiration and life of impact!

**Wealth Architects, LLC**  
980 followers  
1yr · 🌐

On today's day of service that honors Dr. Martin Luther King, we would like to circulate his "Life's Blueprint" speech, a poignant oration that drives at the importance of dignity, self-worth and hard work. We hope it serves as inspiration for you as you reflect on your own life aspirations and set your personal and professional goals for 2021.

<https://lnkd.in/eaujYxw>

**Pam Baker** · 1st  
Entrepreneur, Healthcare Executive and Dot Connector. Currently I'm Minding the Gap  
11mo · 🌐

"Mom, can we talk more about this tomorrow? I'm hooked" said my 13 year old daughter after watching the film \$avvy: why women need to understand and control their finances. Check it out - you (and the girls and women you know) won't want to miss. Thanks [Robin Hauser](#) for helping us learn, laugh and control our financial futures.

[#womenandmoney](#) [#womenandwealth](#)

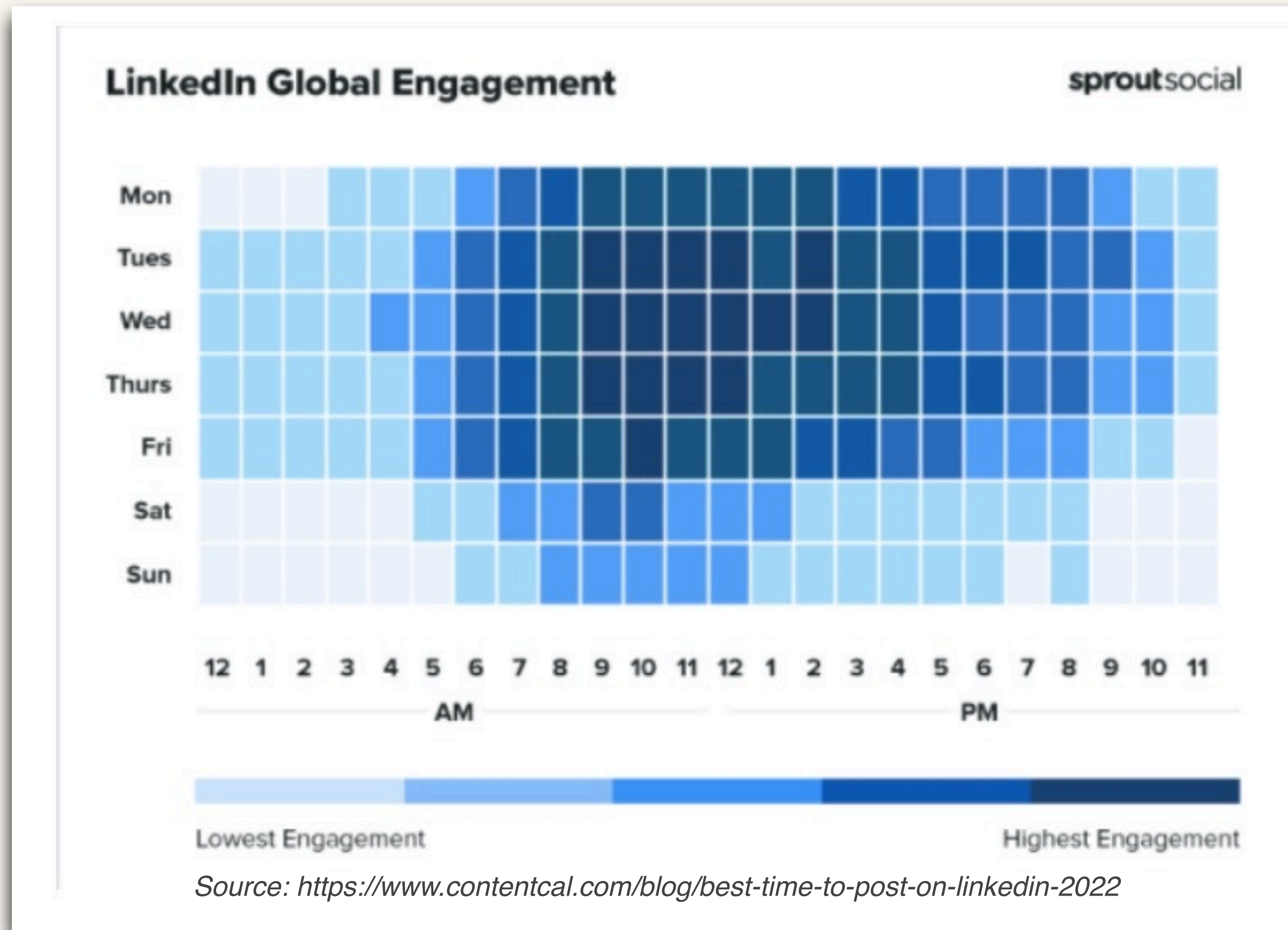
**\$AVVY**  
Women. Money. Freedom.

**\$avvy Documentary Trailer**  
vimeo.com

👍 23      2 comments · 4 shares



# Ongoing Engagement: Best Time to Post?



❖ **Best:** Tue, Wed & Thurs 9-12pm

❖ **Worst:** Sun

*KNOW YOUR NETWORK  
& EXPERIMENT*



# Ongoing Engagement: Don't Overthink, Make Fun

## PHOTOS GOOD, MULTIPLE BETTER, DOGS THE BEST

**Jodi Morris**  
Connecting People & Ideas To Maximize Our Impact | CGG Experience Curator | Succe...  
2mo • Edited • 🔒

Week 3 of interviewing **SHE-CAN** applicants from Liberia. It's presentation day!

...see more



69 5 comments • 3 shares

**Jodi Morris**  
Connecting People & Ideas To Maximize Our Impact | CGG Experience Curator | Succe...  
1mo • 🔒

After two long years, the next international **Connecting Growth Globally** (CGG) Experience will be in Tanzania, October 10-18, 2022.

...see more




with Connecting Growth Globally

Robert Morris and 25 others 2 comments

**Jodi Morris**  
Connecting People & Ideas To Maximize Our Impact | CGG Experience Curator | Succe...  
1mo • 🔒

Two things I believe:

1. LinkedIn can be fun. We don't have to ...see more



Jeff Aaron and 93 others 27 comments

How Do You Measure Success?



---

# LinkedIn: You as a Real Person...Even Better

---

## *YOUR NEXT STEPS*

- ❖ **A LinkedIn Profile That Showcases You:** Values, Strengths, Aspirations
- ❖ **Grow Your Network:** Connect to Colleagues, Clients, Vendors, Family, Friends, University, Personal Connections as part of everyday real-life
- ❖ **Engagement is Ongoing:** Celebrate, Share Yourself, Engage with Your Network
- ❖ **Share a LinkedIn Post Today** About Something You Learned at FPA NorCal (@FPA NorCal Conference, @Tag People / Firms, #FPANorCal)



---

# More LinkedIn Resources

---

## *CONNECTING GROWTH GLOBALLY (by Jodi Morris)*

- ❖ [“What Most People Miss on LinkedIn”](#) (Profile)
- ❖ [“How to Engage on LinkedIn”](#) (Connecting & Engaging)



## *LINKEDIN FOR FINANCIAL ADVISORS*

- ❖ [Samantha Russell](#), Chief Evangelist, FMG Suite / Twenty Over Ten
- ❖ [Sara Grillo](#), Consultant & “Leopard of LinkedIn Marketing for Financial Advisors”
- ❖ [Michael Kitces](#), Head of Planning Strategy, Buckingham Wealth
- ❖ [Stacy Havener](#), Champion of Investment Boutiques & Founder / CEO, Havener Capital Partners
- ❖ [Stefanie Marrone](#), Marketing / Branding / LinkedIn for Law Firms

*Admiring someone who does LinkedIn well? Follow their lead!*





# A Special Invitation for FPA NorCal Attendees

Exclusive for FPA NorCal

Connecting Growth Globally



*"The way we connect in the virtual world changes how we connect in the real one."*

## LINKEDIN SUMMERCAMP

FINANCIAL ADVISORS

**Pre-Work**  
1 Update LinkedIn Profile per provided checklist for personalized coaching feedback (includes edits to About story)

**Group Coaching**  
2 Join cohort (max 6 advisors) on June 20 for 90-minute session on LinkedIn profile & engagement

**Individual Coaching**  
3 Personal 60-minute session to finalize Profile and plan for engagement strategy

**WHY JOIN?**  
LinkedIn provides a powerful platform to show not only **what we do**, but **who we are**, **what we believe**, and **the people & organizations we celebrate**. For wealth managers, it's critical.

**ABOUT JODI MORRIS**  
Jodi describes her **WHY** as connecting **people & ideas towards maximizing our impact**. Following two+ decades as an executive in investment management, as a **Success Coach** she enjoys helping others (especially wealth managers) share their story.



**REGISTER BY** June 10, 2022  
**FEE** \$595

Learn More: [www.ConnectingGrowthGlobally.com/LinkedIn](http://www.ConnectingGrowthGlobally.com/LinkedIn)  
Contact Jodi Morris: [jodi@ConnectingGrowthGlobally.com](mailto:jodi@ConnectingGrowthGlobally.com)

- ❖ Combo group & individual coaching summer camp
- ❖ Deepen LinkedIn profile & engagement strategy
- ❖ Includes editing of your LinkedIn "About" story
- ❖ Limited to 6 participants
- ❖ Register by June 10
- ❖ Group session on June 20
- ❖ Fee \$595



[www.ConnectingGrowthGlobally.com/LinkedIn](http://www.ConnectingGrowthGlobally.com/LinkedIn)

[Jodi@ConnectingGrowthGlobally.com](mailto:Jodi@ConnectingGrowthGlobally.com)



# Thank You...Let's Connect!



“The way we connect in the virtual world changes how we connect in the real one.”

—Jodi Morris

Jodi Morris, CFA, CFP®  
Connecting Growth Globally  
(415) 518-1295

[Jodi@ConnectingGrowthGlobally.com](mailto:Jodi@ConnectingGrowthGlobally.com)

LinkedIn: [@JodiMorrisSF](https://www.linkedin.com/in/@JodiMorrisSF) (QR code above)