

LINKEDIN PROFILE SETUP GUIDE

Financial Advisor
Financial Advisor at SM Wealth Management
Tampa/St. Petersburg, Florida Area | Financial Services

Recommended for you

0 connections

Visible to your connections

Email: clientcommunications@raymondjames.com
Phone: 727.555.5555 (work)
IM: [icon]
Address: 123 Advisor Street, Tampa, FL 55555

Visible to everyone on LinkedIn

Twitter: SMWManagement
Websites: SM Wealth Management Website
www.linkedin.com/in/raymondadvisor/ Edit

Activity

Raymond Advisor
It's official. Now you can keep up with our team on Twitter and Facebook. Be sure to follow and friend us for regular updates!
Like · Comment · Share · 19 hours ago

Background

Summary
Licensed financial advisor with broad experience in all aspects of financial planning. Specialize in helping individual and institutional clients to plan for financial needs including retirement planning, estate planning and educational planning.
Specialties: Specializing in portfolio management, IRAs and 529 plans to help clients prepare for their

Callouts:

- ★ Create a descriptive and compelling headline.
- ✓ Use a professional headshot. Your LinkedIn profile is seven times more likely to get viewed if you have a profile picture.
- ✓ Add your Twitter account to connect with followers.
- ★ Drive traffic back to your website. Select "other" in the dropdown menu to type in the title of your website.
- ★ Click Edit to personalize your LinkedIn URL to include your name.
- ✗ Add relevant posts for your network (based on compliance approval - support will vary by firm).
- ✓ Use keywords and search phrases throughout your profile that will resonate with your clients and prospects.

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Experience

[+ Add a position](#)

Financial Advisor

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SM Wealth Management
October 2011 – Present (1 year 11 months) | Tampa/St. Petersburg, Florida Area

My focus is to build comprehensive financial plans and investment strategies for high-net-worth individual and institutional clients. This includes retirement and estate planning as well as managing 401 (k) plans for local companies.

I've worked with my team at SM Wealth Management in the Tampa Bay area since October 2011. Combined, we have more than 60 years of experience in financial planning and investment management and serve a wide variety of clients.

In addition to being Series 7 and insurance licensed, I hold the Accredited Wealth Management Advisor (AWMA) and Chartered Retirement Plans Specialist (CRPS) designations from the College of Financial Planning. I recently began studying for the CERTIFIED FINANCIAL PLANNER certification.

Service Associate

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Raymond James
January 2004 – October 2011 (7 years 10 months) | Tampa/St. Petersburg, Florida Area

Supporting a team of financial advisors in a local branch, executing client transactions and coordinating marketing efforts.

Education

[+ Add](#)

University of Florida - Warrington College Of Business

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BSBA, Finance

Skills & Expertise

[+ Add](#)

Portfolio Management 401k Rollovers 529 Plans

Honors & Awards

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Additional Honors & Awards

[Edit](#)

Chairman's Council Member, 2008-2009
Featured in On Wall Street's "Top 40 under 40" ranking

Organizations

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Additional Organizations

[Edit](#)

The National Association of Personal Financial Advisors, Financial Advisors Legal Association, Raymond James Employees, UF Alumni Association, Tampa Bay Business Network, Raymond James Gasparilla Festival of the Arts

Additional Info

Click Edit to personalize your professional experience.

Be sure to include former employers to be connected to other LinkedIn users who have worked for those companies.

In addition to listing your alma mater, join alumni groups to be connected with potential clients who went to the same schools.

Check with your compliance department for specific policies on hiding endorsements and recommendations.

Joining cultural, professional and alumni groups is a great way to show your expertise and connect with those who have similar interests.

IMPORTANT COMPLIANCE NOTE:
Firm restrictions for social media will vary.
Check with your compliance department.

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