

Digital Marketing That Works

Practical Tactics for Advice Firms

Tom Newbould
Chief Marketing Officer, Timeline

Before a client speaks to you...
they've **already** formed an
opinion.

And increasingly... that opinion is **formed** in the Digital Marketing & Social Media space.

Tom Newbould, Chief Marketing Officer



- Joined Timeline in 2022
- Digital-first marketing leader with over 25 years' experience, mainly in fast-growth fintech and financial services brands
- Fellow of the Chartered Institute of Marketing
- Ex PwC, Tesco Bank, MYJAR & Oakbrook

Best in Class Marketing Team



- Over 100 years of combined Marketing experience
- Deep practitioner & SMEs skills covering every channel
- CIM Professional Memberships, inc 2 CIM fellows
- Won Investment Week's Marketing Team of the Year

Tom Newbould
Chief Marketing Officer

Hana Dickinson
Head of Marketing

Jake Usher
Senior Multimedia Specialist

Yasa Allameh
Digital Marketing Specialist

Aidan Carey
Marketing Executive

Lorna Pissarro
Marketing Manager, Brand

Sasha Laverick
Marketing Manager, CRM

Melissa Canham
Marketing Manager, Comms

Georgia Beckett
Marketing Manager, Events



A PROFESSIONAL'S DIGITAL PRESENCE ECOSYSTEM



Social media allows firms to **reach a large audience** with greater **speed** and **frequency** than ever before.

FCA FG24/1

“Digital marketing has become the **go-to means of promotion** for financial advisers.”

Vanguard UK

Nearly **80%** of Gen Z and Millennial investors who seek financial advice use social media to **source** or **evaluate it**

Around **half of affluent and HNW investors** say they are **more likely** to engage with an adviser who has an **active social media** presence.

Nearly **70%** of **younger investors** engaging paid advisers interact with them monthly and **expect regular digital communication.**

Part 1

How can I improve my website?

Websites that work.

The missing ingredient.

5 KEYS TO A GREAT FINANCIAL ADVISER WEBSITE



Where Firms **Lose** Clients.

Interest is **rarely** the problem. ~~Friction~~ is.

By the time someone is on your website...
They're already interested.

But most firms make the next step unclear, slow, or uncomfortable. That's where opportunities are lost.

The 5 second test.

In 5 seconds, a client should know:

1. **Who** you help
2. **What** you help them do
3. Why **they** should trust **you**



Remove friction

- Clear next steps
- Book a call
- Make it easy, not formal



Show them.

And make it feel simple.

QUESTION

The Website Scorecard

Score your website 1–5 for each criteria (5 being perfect):

- Clarity (Would a client understand you instantly?)
- Consistency (Do you show up regularly?)
- Conversion (Is the next step obvious?)



Welcome to Morpurgo Wealth

Making independent financial advice more accessible



Morpurgo Wealth was established to offer accessible, clear and concise, independent financial advice by eliminating the jargon and using understandable terminology for clients' full understanding of their wealth, long-term planning and investments.

Meetings are offered via Zoom, Face to Face, or a WhatsApp / telephone call.

Experience, Certificates and Professional Recognition

No clear next steps

No CTA above the fold



0800 689 4126

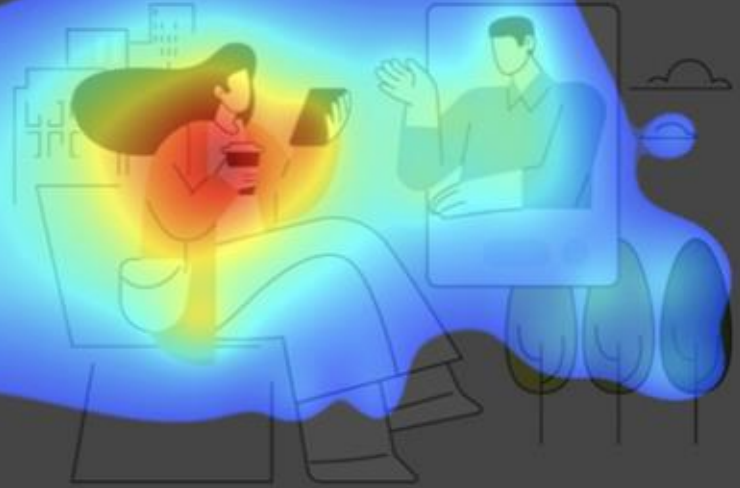


[Home](#) [About](#) [Our Services](#) [FAQs](#) [Testimonials](#) [Contact Us](#)



Welcome to Morpurgo Wealth

Making independent financial advice more accessible



Morpurgo Wealth was established to offer accessible, clear and concise, independent financial advice by eliminating the jargon and using understandable terminology for clients' full understanding of their wealth, long-term planning and investments.

Meetings are offered via Zoom, Face to Face, or a WhatsApp / telephone call.

Experience, Certificates and Professional Recognition

No CTA above the fold

Welcome to Morpurgo Wealth

Making independent financial advice more accessible

[Enquire today](#)



Morpurgo Wealth was established to offer accessible, clear and concise, independent financial advice by eliminating the jargon and using understandable terminology for clients' full understanding of their wealth, long-term planning and investments.

Meetings are offered via Zoom, Face to Face, or a WhatsApp / telephone call.

Experience, Certificates and Professional Recognition

CTA Added



0800 689 4126



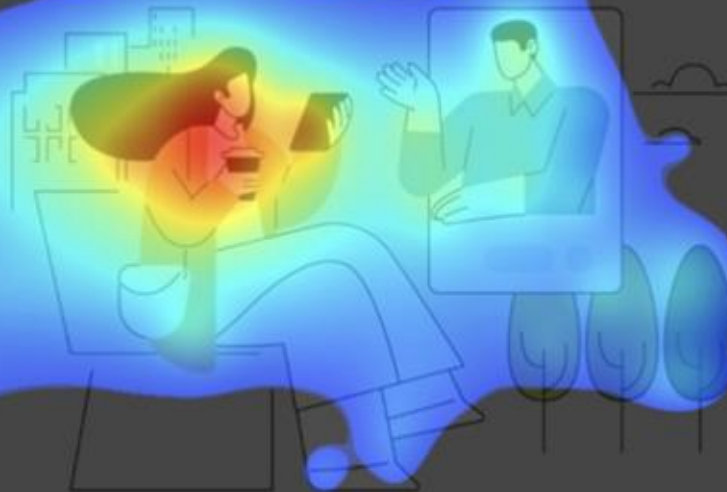
[Home](#) [About](#) [Our Services](#) [FAQs](#) [Testimonials](#) [Contact Us](#)



Welcome to Morpurgo Wealth

Making
independent
financial
advice more
accessible

[Enquire today](#)



Morpurgo Wealth was established to offer accessible, clear and concise, independent financial advice by eliminating the jargon and using understandable terminology, for clients' full understanding of their wealth, long-term planning and investments.

Meetings are offered via Zoom, Face to Face, or a WhatsApp / telephone call.

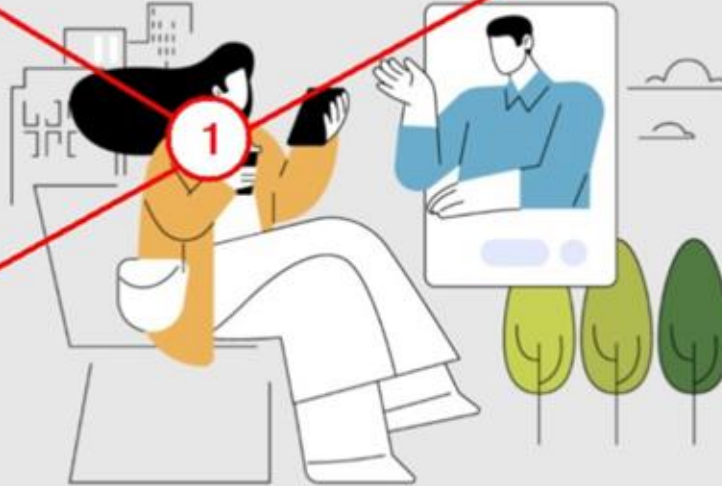
Experience, Certificates and Professional Recognition

Now we see attention focused on the CTA as well as the hero image

Welcome to Morpurgo Wealth

Making
independent
financial
advice more
accessible

Enquire **3** day



Morpurgo Wealth was established to offer accessible, clear and concise, independent financial advice by eliminating the jargon and using understandable terminology for clients' full understanding of their wealth, long-term planning and investments.

Meetings are offered via Zoom, Face to Face, or a WhatsApp / telephone call.

Experience, Certificates and Professional Recognition

The gaze sequence now ends on the CTA and socials

Welcome to Morpurgo Wealth

Making
independent
financial
advice more
accessible



Enquire today

Morpurgo Wealth was established to offer accessible, clear and concise, independent financial advice by eliminating the jargon and using understandable terminology for clients' full understanding of their wealth, long-term planning and investments.

Meetings are offered via Zoom, Face to Face, or a WhatsApp / telephone call.

Experience, Certificates and Professional Recognition

Make phone
number more
prominent

80% MORPURGO WEALTH

68% 800 689 4126

Home About Our Services Testimonials Contact Us



Welcome to Morpurgo Wealth
Making independent financial advice more accessible



84%

32%

Enquire today



Morpurgo Wealth was established to offer accessible, understandable financial advice by eliminating the jargon and using understandable terminology for clients' full understanding of long-term planning and investments. Meetings are offered via Zoom, Face to Face, or a WhatsApp / telephone call.

Experience, Certificates and Professional Recognition

Primary attention area is now focused where it should be



Your trusted partner for
intelligent wealth
planning

Kato Wealth Planning is an independent financial planning firm dedicated to delivering bespoke wealth solutions. With over 20 years of experience, we provide strategic financial guidance that aligns with your goals.

Our client-first approach ensures tailored financial plans, proactive investment strategies, and tax planning advice for a secure financial future.

No CTA above
the fold

The screenshot shows a website for Kato Wealth Planning. At the top left, the logo 'KATO' is followed by 'INTELLIGENT WEALTH PLANNING'. A 'Contact us' link is in the top right. The main image is a kayaker on a river. A red callout bubble highlights the kayaker, containing a '73%' statistic. A yellow callout bubble highlights the paddle, containing a '68%' statistic. Another yellow callout bubble highlights the text 'Your trusted partner for intelligent wealth planning', containing a '57%' statistic. A blue callout bubble highlights the 'KATO' logo, containing a '30%' statistic. Below the image, there is a paragraph of text about the firm's experience and a paragraph about their client-first approach.

30%

INTELLIGENT WEALTH PLANNING

Contact us

73%

68%

Your trusted partner for intelligent wealth planning

57%

Kato Wealth Planning is an independent financial planning firm dedicated to delivering bespoke wealth solutions. With over 20 years of experience, we provide strategic financial guidance that aligns with your goals.

Our client-first approach ensures tailored financial plans, proactive investment strategies, and tax planning advice for a secure financial future.

No CTA above the fold



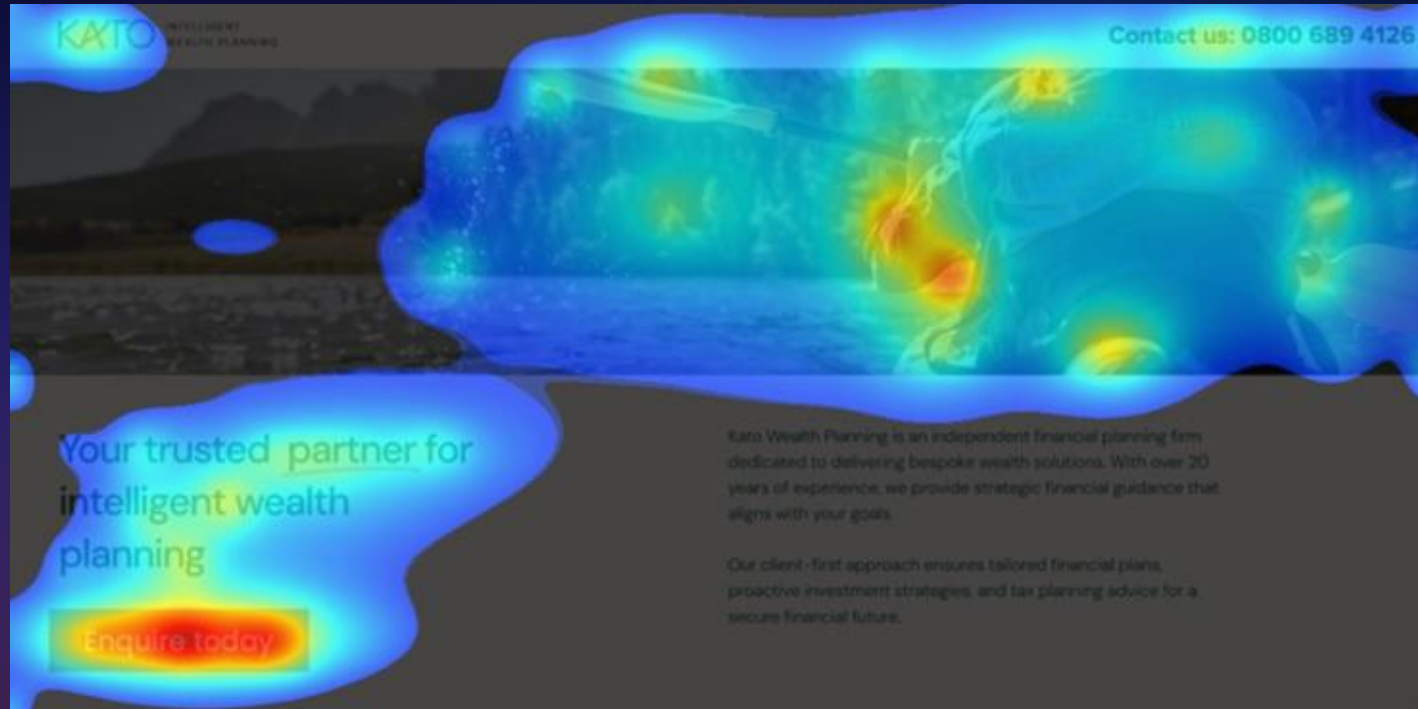
Your trusted partner for
intelligent wealth
planning

Enquire today

Kato Wealth Planning is an independent financial planning firm dedicated to delivering bespoke wealth solutions. With over 20 years of experience, we provide strategic financial guidance that aligns with your goals.

Our client-first approach ensures tailored financial plans, proactive investment strategies, and tax planning advice for a secure financial future.

No CTA above
the fold



Primary attention area is now focused where it should be

The image shows a screenshot of a website for Kato Wealth Planning. The website has a header with the logo 'KATO WEALTH PLANNING' and the tagline 'INDEPENDENT WEALTH PLANNING'. A contact number '0800 689 4126' is visible in the top right. The main visual is a photograph of a person kayaking on a river. Three callout boxes with percentages are overlaid on the image: '49%' in the top left, '76%' in the center over the kayaker, and '94%' in the bottom left. A large yellow arrow points from the bottom left towards the '94%' callout. The website content below the image includes the headline 'Your trusted partner for intelligent wealth planning', a sub-headline 'Enquire today', and two paragraphs of text describing the firm's services.

KATO WEALTH PLANNING
INDEPENDENT WEALTH PLANNING

Contact us 0800 689 4126

49%

76%

94%

Your trusted partner for intelligent wealth planning

Enquire today

Kato Wealth Planning is an independent financial planning firm dedicated to delivering bespoke wealth solutions. With over 20 years of experience, we provide strategic financial guidance that aligns with your goals.

Our client-first approach ensures tailored financial plans, proactive investment strategies, and tax planning advice for a secure financial future.

Primary attention area is now focused where it should be

Part 2

What works on Social Media?

Your

LinkedIn®

SuperPowers



Why this matters

Clients are not just buying products. They're buying:

- Confidence
- Competence
- Consistency
- and the ~~People~~ behind the advice [ie. you].

Why this matters

Research cited by LinkedIn and Edelman found:

- **7 in 10** decision-makers think more positively about companies producing high-quality thought leadership
- **92%** of professionals are more likely to trust a company whose senior executives use social media
- **LinkedIn** is considered the **most trusted** social platform among financial services buyers

The trust infrastructure



Clients increasingly look for **human proof points** before engaging

It's an important part of a **trust infrastructure**.

A polished, credible LinkedIn presence from Investment team members reduces the adviser's perceived risk.

The Opportunity

Why

Linked in®



LinkedIn[®]



The world's largest professional network

More than 1 billion members in more than 200 countries and territories worldwide.

77% of advisers **use** LinkedIn professionally.

70%

of people looking for a service
engage more with businesses whose
leaders are active on LinkedIn

47%

Of HNWs in the UK use LinkedIn **regularly**

Source: Ledbury Research (UK Millionaire Omnibus) / "Join the Dots" research

69%

LinkedIn

of HNWs are active on

Source: [LinkedIn Business Solutions](#)

40%

of UK investors have turned to social-media in the past two years to inform their financial decisions

(Source: Fidelity International / [Professional Adviser](#))

36%

Of millennial HNWs say social media is a source of advice/influence when choosing an adviser.

(Source: [BBHub Assets](#))

50%

Of investors say social media **impacts** whom they **hire** as a financial professional

20%

said the advisor's social-media was the **sole** deciding factor

Source: "Marketing to the High-Net-Worth Client – How the HNW are using Social Media" (Putnam Social Advisor Survey 2019) in the document "Marketing to the High-Net-Worth Client". info.symmetrypartners.com

Rough combined number of *HNWIs + CEOs / Directors* on LinkedIn in UK

Given overlap, to avoid double-counting people who are both CEOs/Directors *and* wealthy, here's what combining them roughly looks like:

- CEOs / Directors visible on LinkedIn: ~ 70,000
- Other HNWIs (not CEOs/Directors) visible on LinkedIn: maybe another ~ 350,000-400,000
- Total: \approx **400,000-500,000** UK people who are either high net worth or CEO/Director **and** have a visible LinkedIn profile using those titles or similar.



**The chance to advertise
yourself to this many
potential clients for free**

x1000

QUESTION

How often do you currently post on LinkedIn?

- Daily
- Weekly
- Monthly
- Occasionally
- Never

1%

of the UK's advisers **post** regularly on
LinkedIn



Powering up
your profile

The Golden Triangle



- **Powering** your profile
- **Building** your network
- **Booming** your visibility

The First Impression Matters

- 1** Professional headshot (friendly but credible).
- 2** Banner image: reinforce your brand (not the default grey!).

How long does it take someone to form an opinion of you if you appear in a LinkedIn search?




vevo

Optimise Your Headline

1 Move beyond job title → state who you are, who you help and how.

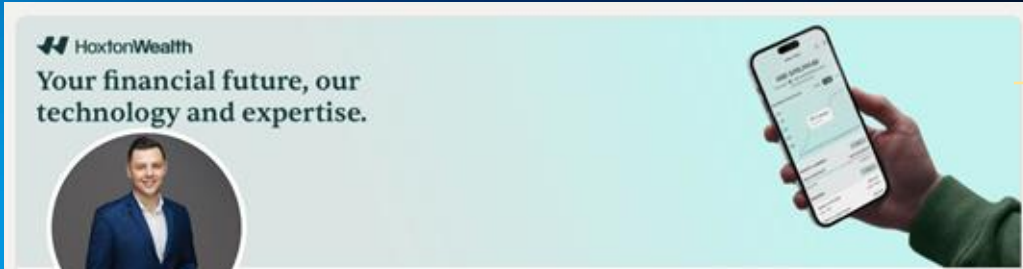
Example:

 *"Independent Financial Adviser at Company Name"*


 *"Independent Financial Adviser | Helping you build your financial future today for tomorrow | Company Name"*

This is important for both LinkedIn search & GPT search!

“Optimised” versus “Could Do Better”



HoxtonWealth
Your financial future, our technology and expertise.



Vibrant & Warm



Suttons
for a brighter future
LIVE LIFE IN FULL COLOUR



tute for
rent...

Ben Preston  · 2nd

Trusted Advice for Aspirational Professionals & Business Owners |
Build Wealth Optimally & Enjoy Spending it with Confidence | MD &
Chartered Financial Adviser at Suttons

Manchester Area, United Kingdom · [Contact info](#)

 Suttons IFA, Chartered
Financial Planners



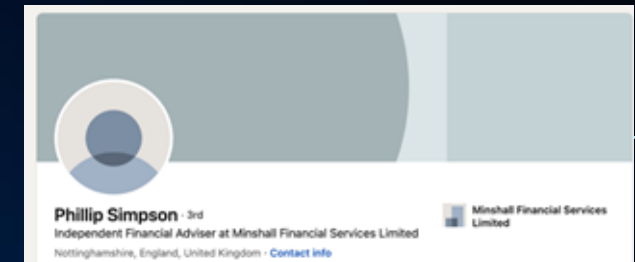
George Goward · 2nd
Managing Director at George Square Financial Management Ltd
Nottinghamshire, England, United Kingdom · [Contact info](#)




George Square Financial
Management Ltd



Trent College



Phillip Simpson · 3rd
Independent Financial Adviser at Minshall Financial Services Limited
Nottinghamshire, England, United Kingdom · [Contact info](#)



Minshall Financial Services
Limited

Grey & Impersonal

Craft Your 'About' Section

- 1** Move beyond job title → state **who** you are and who you **help**.
- 2** Structure: Who you help → **How** you help → **What** makes you different → **Why** should I pick you?
- 3** Use **warm**, approachable tone with credibility markers (years of experience, certifications)







If you don't have one...











- Multiple LinkedIn-focused credibility studies explicitly identify **profile completeness** as a trust signal.
- A 2025 study on incomplete LinkedIn profiles found that incomplete profiles **increased suspicion** and **mistrust**.
- An client viewing **no About section + no posting** activity often interprets that as:

“I can't really tell who this person is.”

What do all these profiles have in common?



-  **Jean Wright** · 3rd
Talent Acquisition Specialist | Angel Investor | Networking Guru
-  **Theresa Clark** · 3rd
Global Talent Development Leader at Western Digital
-  **Theresa Bailey** · 3rd
Award-Winning HR Consultant, Aspiring Best-Selling Author and Podcast Creator
-  **Kathleen Wright** · 3rd
Expert In Remote Hiring, Business Mentor and Networking Guru
-  **Irene Pratt** · 3rd
Talent Acquisition Specialist, Startup Investor and Growth Expert
-  **Alison Spencer** · 3rd
Expert in Hiring Internationally, Networking Guru and Podcast Creator

-  **Tonya Pittman** · 3rd
Social Entrepreneur & Crisis Relief Thinker | Networking Guru | Advisor & Co
-  **Helen Walker** · 3rd
International Crisis Relief Expert | International Speaker | Life Coach
-  **Sonya Bates** · 3rd
Crisis Relief Consultant & Expert | Branding Advisor | Business Coach
-  **Elena Gardner** · 3rd
International Crisis Relief Specialist | Branding Queen | International Consulta
-  **Delia Howard** · 3rd
International Crisis Relief Expert | Aspiring Angel Investor | Coding Expert
-  **Jacqueline Lopez** · 3rd
International Crisis Relief Specialist | Advisor & Consultant | Technology Enth
-  **Susan Phillips** · 3rd
International Crisis Relief Expert, Technologist , and Branding Queen
-  **Mildred Owens** · 3rd
Crisis Relief Consultant & Expert | Branding Queen | Coding Guru
-  **Pamela Scott** · 3rd
Crisis Relief Consultant & Expert | Business Coach | Technology Consultant
-  **Carolyn Carr** · 3rd
Humanitarian Aid Expert | Technology Expert | Aspiring Best-Selling Author

Someone I'd be confident about ...

About

Making finance relatable to you.

I am extremely passionate about educating my clients and those around me about the world of finance and the opportunities & reassurance it can bring.

I will ensure that you have the knowledge and understanding of what is right for you, your family and your business and I will empower you to make the right financial decisions to better your future.

Finance can be complex and daunting, I take responsibility for making it relatable and personal to you and your circumstances.

I get to know my clients and build long term relationships helping you to achieve your financial goals now and into retirement.

I do this through holistic financial planning that considers your needs around;

Protection
Retirement Planning
Savings and Investment Planning
Mortgage
& Estate Planning

Why is it important to optimise my profile?

57%

Don't trust a professional with an incomplete profile

21x

More LinkedIn views for a profile with a professional headshot

11x

More LinkedIn views if you have a professional banner image

And just 7 seconds to make a first impression!



Building your network

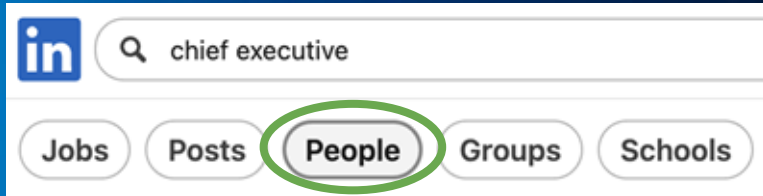
Building Connections

- 1** Personalise invites: mention shared context or value.
- 2** Follow-up with **helpful** content, **not** a sales pitch
- 3** Quality > quantity – **focus** on your ideal clients and professional contacts

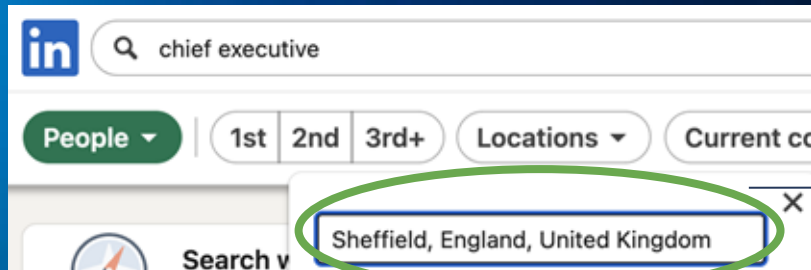
Finding new connections



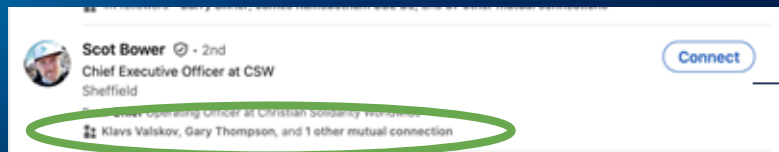
Search for a relevant title



Click on the 'People' tab



Define a location



Review the list of suggested contacts:
focus on those with mutual connections

QUALITY

Connections.

20

No more than **20** connection requests a day

Quality > quantity

focus on ideal clients in your area

Networking

Add professional contacts

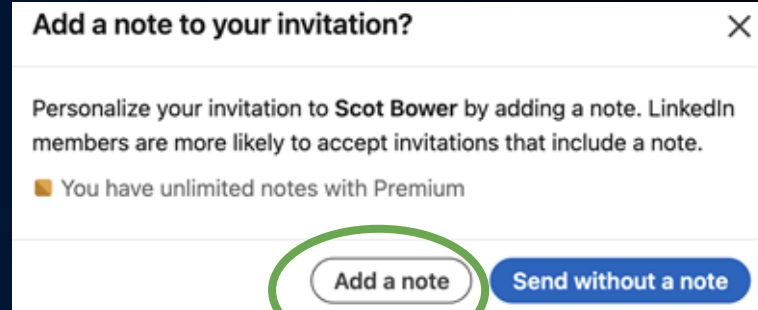
Don't be afraid to reject requests that aren't relevant to you

Making connections

Generic & Impersonal:

"Hi, I'd like to add you to my professional network."

Lacks context and shows no personal interest.



Add a note to your invitation? ✕

Personalize your invitation to **Scot Bower** by adding a note. LinkedIn members are more likely to accept invitations that include a note.

■ You have unlimited notes with Premium

Add a note **Send without a note**

Show value from the first moment

Personalised & Value-Driven:

"Hi [Name], I noticed your post about the challenges of retirement planning for small business owners. As a financial adviser specialising in helping entrepreneurs, I often see similar challenges. I'd love to connect to share some insights and potentially build a professional relationship."

Referencing a Shared Connection:

"Hi [Name], I see we're both connected with [Mutual Connection's Name] and share an interest in [Industry]. I'm always looking to expand my network with other [Industry] professionals, and I'd be pleased to connect with you."

A red vintage mailbox is mounted on the trunk of a tree. The mailbox has a decorative top and a small window. In the background, a street with cars and trees is visible, slightly out of focus.

Booming your visibility

If you're posting consistently, even just 2-3 times a week, with something useful to say, you're already ahead of 99% of your peers

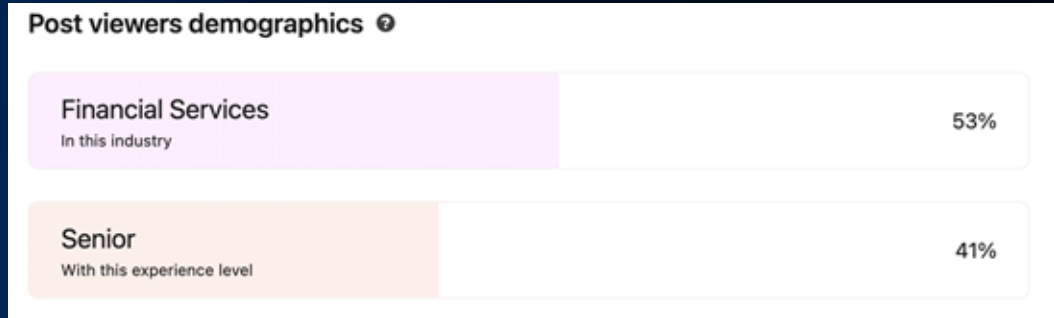
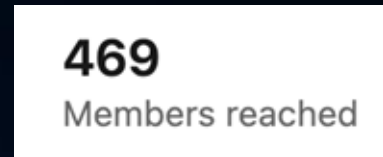
The unseen influence of a single post



- First post for over a month
- Unfocused network
- 1 minute photography
- Freehand words

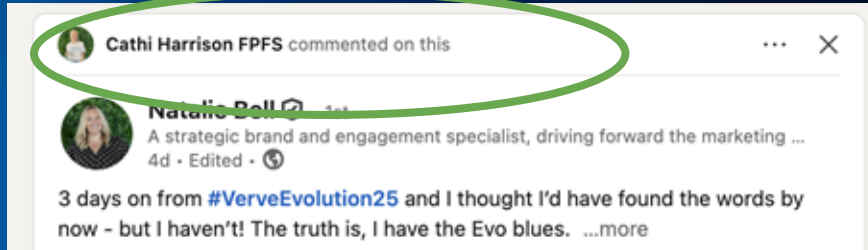
The unseen influence of a single post...

*in just **one** day*

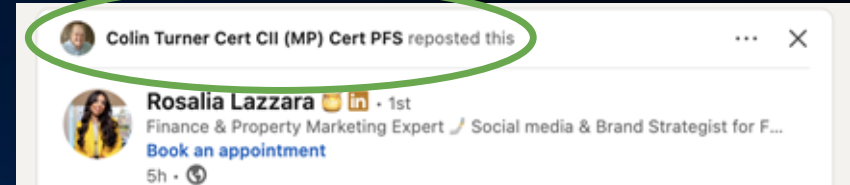


Which is best: Comment, Repost or Like?

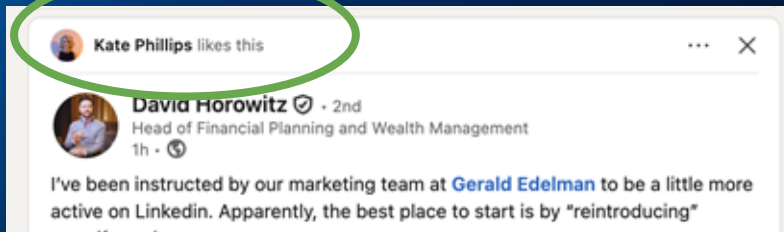
1



2



3



Comments get **30–75x**
more views than likes



Why Comments are Most Powerful

40,560

All appearances

▼47% past 7 days

239

Search appearances

●0% past 7 days

Where you appeared

Comments · 69.3%

Post · 28%

Network recommendations · 2.1%

Search · < 1%



Why Comments are Most Powerful



Builds Relationships

Allows for thoughtful interactions that build professional connections, much like networking at an event, and **gains you qualified visibility** with a **wider** audience.



Algorithm Preference

LinkedIn's algorithm favors comments because they **indicate deep engagement** and a **desire to discuss the content**, which aligns with LinkedIn's goal of fostering professional relationships and conversations.



Deeper Engagement

Unlike the passive "like," a thoughtful comment provides more data about the user's **thoughts and experience**, which is more valuable to the author and the LinkedIn community.

5 types of comments to drive your impact

1. **The Experience Share:** Relate a real example and key insight.
2. **The Resource Add:** Share a tool or framework that solves a problem.
(or just say: "I'd add ...")
3. **The Contrarian Insight:** Challenge a common belief with data.
4. **The Specific Question:** Ask an insightful question to spark conversation.
5. **The Case Extension:** Apply the post's idea to financial advising.

Part 3

Simple Ideas. **Maximum** Impact
Practical Ways to Generate Visibility

TOP TIP

The 80/20 rule of LinkedIn in 2026

- **80%** of your time: Strategic commenting
- **20%** of your time: Original content creation

= maximises visibility while minimising effort.

+ like as many Timeline or colleague posts as you can

TOP TIP



Provide value and share knowledge

Use visuals and multimedia content to better communicate your message

Use a professional tone and be respectful in sharing your opinions and perspectives

Build a community by engaging with readers and other people in your network

Be yourself by sharing content that is relevant to what you do and authentic to who you are



Abraham Okusanya · 1st

Founder/CEO, Timeline, on a mission to help millions face their financial f...

2w · Edited · 🌐

I don't quite know how to say this nicely, and I loathe being the Debbie Downer at the start of what should be a fabulous year, but here's the brutal truth: the business of financial advice has a growth problem.

The FCA's RMAR data shows total retail investment advice revenue grew from £2.8bn in 2014 to £5.3bn in 2023—an annual growth of 6.71%. Sounds good, right?

But dig deeper, and you'll see growth has slowed drastically: from 9.63% annually (2014–2018) to just 3.74% (2019–2023). Adjust for inflation, and it's even worse—a real-term annual decline of -2.16%. Excluding the COVID market bump, that figure drops a shocking 36%.

Here's a link to my thoughts on the issue and how we can begin to tackle it..

<https://lnkd.in/g-12XwM9>

RETAIL INVESTMENT T ADVICE REVENUE

RETAIL INVESTMENT REVENUE & ANNUAL GROWTH



Laurentius van den Worm, CFA · 1st

Head of Investment Strategy at Timeline Portfolios

3mo · 🌐

A fantastic day on the road with Timeline

We kicked off the morning in Liverpool, then headed to Cheshire for a brilliant afternoon event. It was great connecting with clients and prospects about how Timeline's best-in-class tech stack and portfolios empower advisors to deliver real value to both advisors and their clients.

Meanwhile, back in South Africa, it's Braai Day #1. Yes, we actually have a public holiday dedicated to having a braai. A braai is the South African version of a BBQ, but with more soul to it. It's the one tradition that transcends all cultures in South Africa, bringing everyone together around a fire. 🇿🇦

Just like people from all walks of life are coming together to have a braai today, I had the privilege of coming together with our advisor community here in the UK's northwest—sharing ideas, building relationships, and discussing ways to create positive outcomes for clients.

Thanks to everyone who joined us in Liverpool and Cheshire—looking forward to Manchester tomorrow!

PS: As all my fellow Saffa friends gather around the fire for a great South African braai, I'm ending my day with some colleagues (I call them friends) over a Great British pint. 🍺 And don't you dare call them the "Manchester clique"—they hate it. 🇬🇧

Cheers 🍻



CEO 49

15 comments

Posting: Missing the mark



Don't share content that is irrelevant to your network or career

Avoid sensationalizing content or misleading readers to entice clicks

Steer clear of overpromoting yourself and instead choose to share valuable and interesting content to grow your network

Don't use offensive language or share opinions that too controversial for LinkedIn

Don't forget to proofread your posts, comments, and messages to ensure they are error-free and professional



TOP TIP



Enhance Communication: Emojis can add depth and emotion to your LinkedIn posts. Use them to express gratitude 🙌❤️, celebrate achievements 🎉🏆🌟, or convey enthusiasm 😊👏. For example, a thumbs-up emoji 👍 can show agreement or appreciation, while a clapping hands emoji 👏 can applaud a job well done.



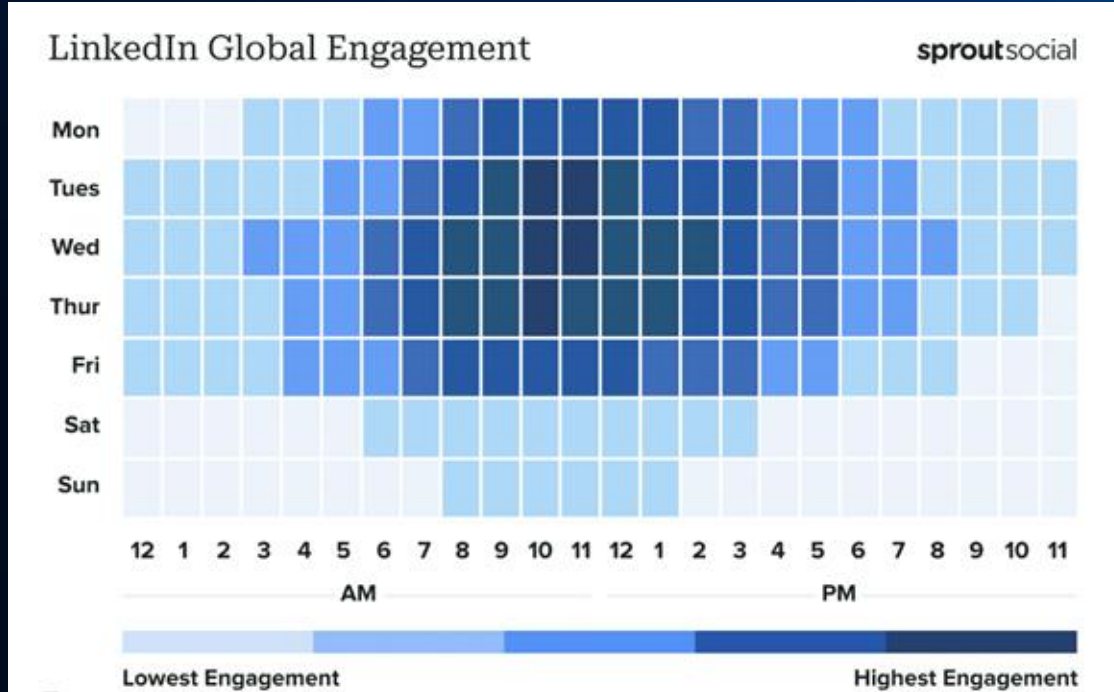
LinkedIn

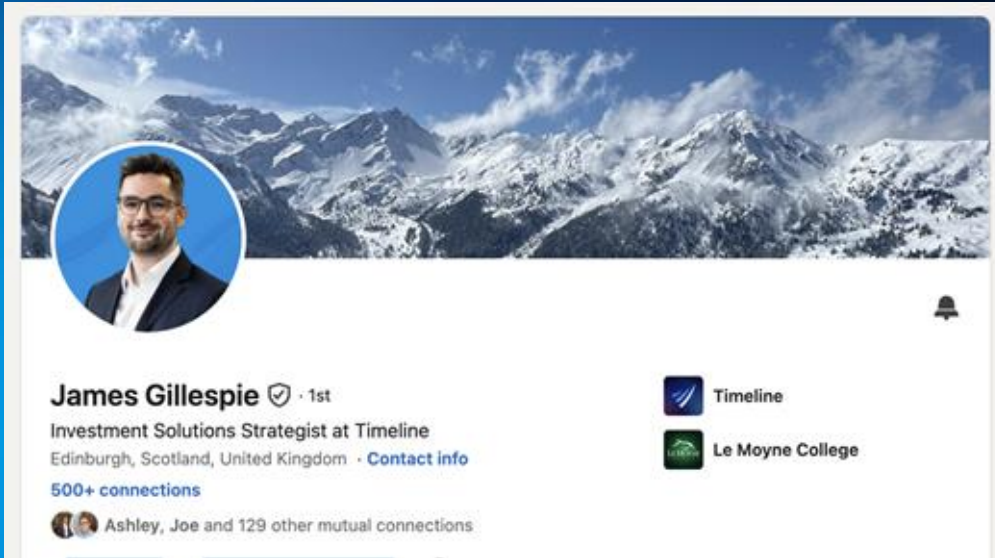
<https://www.linkedin.com> > All > Online Content Creation

How to Use Emojis in Your Social Media Posts

Apr 16, 2023 — A good rule of thumb is to use no more than three emojis per post, and avoid repeating the same emoji multiple times. You also want to avoid ...

TOP TIP





James Gillespie · 1st
Investment Solutions Strategist at Timeline
Edinburgh, Scotland, United Kingdom · [Contact info](#)
500+ connections
Ashley, Joe and 129 other mutual connections

Timeline
Le Moyne College

*Inspiring personal image,
but disconnected*

*Now it's working for
Timeline*





*Now it's working for
Timeline*

*Adding a statement or quote that's meaningful and
relevant can make it even more impactful*



Consistent outcomes aren't found. They're built.

Easy, repeatable tactics

- Weekly LinkedIn post (client-focused)
 - Short, human email to your list
 - Light website updates (keep it fresh)
- > One useful thought per week, shared in a few places, compounds quickly.

Email is undervalued

Familiarity builds trust before the first and every meeting

Because it creates a sense of relationship before you've even spoken.

Trust is built by people

✗ Quarterly Market Update Newsletter

✓ “Hi John – quick thought on markets this week...”

One feels like it came from a firm.

The other feels like it came from a **person**.

Use AI to remove the blank page

AI won't make bad marketing good.
But it will make good marketing consistent.

- ✓ Turn a client question into a LinkedIn post
- ✓ Rewrite your homepage in plain English
- ✓ Draft a short client email in 30 seconds

Less than 30s to write a prompt:

Hey, Tom. Ready to dive in?

I am a UK financial adviser who believes in evidence based investing
I want to write a weekly LinkedIn post which appeals to potential new clients
Can you create some draft posts for me?



Within 15 seconds, we have this:

Post 1 — “The uncomfortable truth about markets”

Most people don't struggle with investing because it's complicated.

They struggle because it's uncomfortable.

Markets fall.

Headlines get loud.

Friends start “doing something”.

And doing nothing feels like the hardest decision of all.

But here's the reality:

The evidence shows that **long-term returns don't come from reacting — they come from staying invested.**

Not chasing trends.

Not timing the market.

Not jumping in and out.

Post 3 — “What actually matters in investing”

When people think about investing, they often focus on:

- ✗ The perfect time to invest
- ✗ The best-performing fund
- ✗ The latest market prediction

But the evidence points somewhere else entirely.

What really matters:

- ✓ Time in the market
- ✓ Diversification
- ✓ Behaviour (especially during downturns)
- ✓ Costs

That's it.

Simple doesn't mean easy.

But it does mean effective.



Post 5 — “What ‘evidence-based’ really means”

“Evidence-based investing” gets used a lot.

But what does it actually mean?

For me, it means:

- Making decisions based on decades of data, not opinions
- Accepting that markets are unpredictable in the short term
- Building portfolios that are designed to work over the long term
- Avoiding unnecessary complexity

It's not about certainty.

It's about probability.

And putting the odds in your favour.

And an offer to do more:

If you want to make these *work harder* (this is the important bit)

A few small upgrades will massively increase impact:

1. Add a soft CTA occasionally (not every post):

"Happy to chat if you're thinking about your own plan."

2. Use light personal framing:

"In my experience working with clients..."

"I often see..."

3. Keep tone calm, not salesy

You're signalling *trust*, not chasing leads.

4. Consistency > perfection

One post a week for 6 months beats 10 "perfect" posts.

If you want, I can:

- Turn this into a **12-week content calendar**
- Tailor posts to **high-net-worth clients specifically**

Visibility builds trust

Trust wins business.

66% of advisers reported that *trust and personal relationships* are the attributes **most valued**.

IFA Magazine

76% of financial-advice seekers rated *trust* as the **most** important value.

Unbiased

A question to take away

What's one thing in your digital marketing right now...

that you know isn't working, but you haven't fixed?

We **empower**
financial advisers

 **timeline**
MONEY FOR LIFE

Thank You