

DIY BIOGRAPHY GUIDE

WHO YOU ARE & WHAT YOU DO NOW

01. (Required) **YOUR NAME AND ANY DESIGNATIONS, AS YOU WANT PEOPLE TO KNOW YOU.** Is your full name Christopher, but everyone calls you Chris? Then use Chris.
02. (Required) **YOUR TITLE.** Examples include things like, Founder, CEO, Financial Advisor, Wealth Management Specialist, Financial Services Professional, Retirement Planning Expert...
03. (Required) **WHAT YOU DO FOR CLIENTS RIGHT NOW?** An example might be "...designing and implementing strategies to help clients conserve and transfer wealth."
04. (Required) **HOW LONG YOU'VE BEEN IN THIS BUSINESS.** It's typically better to say "since (year)" versus "for (#) years", as that keeps your bio more evergreen.
05. (Optional) **RELEVANT NOTABLE RECOGNITION, ACHIEVEMENTS AND AWARDS.** If you have a lot, start a new paragraph to describe them. Most B/D's require that you list the years and/or number of years in which you have achieved these awards. They may also ask for additional disclosures to be added at the end of your bio.

WHAT LED YOU TO WHERE YOU ARE NOW

06. (Required) **RELEVANT EDUCATION AND BACKGROUND.** Noting your *relevant* work background and alma mater makes sense here. You don't need a lot of detail unless it will make a big difference to your target market.
07. (Optional) **DESIGNATION INFORMATION.** Most folks will just leave the "alphabet soup" behind their name, but if you want to elaborate on the designations you've earned and why they're important, this is the place to do that. If you have a lot of designations or want to go into a lot of detail, you could consider adding a section below your bio and using bullet points, or even dedicating an entire page on your website to this information. Contrary to popular belief, people DO care about continuing education.
08. (Optional) **IMPORTANT RESOURCE AND ALLIANCE HIGHLIGHTS.** If you have a broker or RIA that you want to highlight prominently and explain why that relationship is important, this is the best place. Additionally, you can go into more detail in a "strategic alliance" type of page on your website.

PERSONAL DETAILS & CONNECTION POINTS

09. (Required) **COMMUNITY INVOLVEMENT.** If you're an active member in clubs, organizations, boards, or even the coach of your kid's soccer team, sharing that information creates a connection point and helps someone who is vetting you to determine if you would be a good fit. If you don't have anything in the community that you're involved in, skip this section.
10. (Required) **FAMILY AND HOBBY DETAILS.** Share as much as you're comfortable sharing. Most folks at a minimum will say something like, "married to (name) and they have (#) kids and a dog, and live in (town)."