Intro

Your bio is your opportunity to share not just your professional accomplishments and qualifications, but also something more personal, along the lines of what you ask your clients to share with you. Some suggestions:

* why you chose to become a financial advisor
* what motivates you
* community involvement and why that is important to you
* how you like to spend your free time
* your family

Group bio sample text:

Headquartered in [city], [name of firm] has been providing wealth management services to families and businesses for [number] years.

We embrace a holistic approach to wealth management that allows us to deeply understand your situation, values, needs and hopes — everything that is important to you and your family.

Building life-long relationships is important to us. We will work closely with you to help you achieve your goals and prepare you for all of life’s critical financial events.

It has been said that if you can find something you love to do, that you’re passionate about, you’ll never work a day in your life. This is how we feel at [name of firm].

[Insert team names and titles, what they do/their specialty and something personal]

[Including a group and/or individual photos]

Individual bio example:

Headquartered in [city], [name of firm] has been providing wealth management services to families and businesses for [number] years.

I believe in a holistic approach to wealth management that allows me to deeply understand your situation, values, needs and hopes — everything that is important to you and your family.

Building life-long relationships is important to me. I will work closely with you to help you achieve your goals and prepare you for all of life’s critical financial events.

It has been said that if you can find something you love to do, that you’re passionate about, you’ll never work a day in your life. I feel fortunate that this has been the case for me.

[include experience, education and/or special designations and why those matter to clients]

Individual bio example:

My belief is that a financial advisor should be more than a stranger at the other end of the phone line telling you what they think you should do with your money. I spend as much time as it takes to get to know you, your unique financial situation, and your goals. This personalized approach allows me to give you the kind of advice you would expect from a trusted family member or friend — with the added bonus of my years of education and experience to guide you. I’m proud to have earned the designation of a Certified Funds Specialist (CFS®) from the Institute of Business and Finance.

I am not only involved with my clients on a personal level; I am also involved in my community. As part of my continuing commitment to [city/town/community] where I have made my home and raised my family for [time period], I [enter achievements or activities].

One of my true passions in life is [enter activity such as the game of golf]. I volunteer time with [enter volunteer activities] and [enter volunteer activities].

Group bio sample text:

When you think about the future, what matters most to you?

Making work optional? Greater financial security? Creating a legacy for your family?

Since [firm name] was founded in [year founded], we’ve been passionate about making a difference in the lives of our clients, with clear, independent advice to help each client feel financially comfortable and assured.

We believe in building life-long relationships through a unique, holistic approach that allows us to deeply understand your situation, values, needs and hopes everything that is important to you and your family.

We work closely with you to develop thoughtful strategies that are designed to help you achieve your goals and prepare you for all of life’s critical financial events.

And we’ll be there to advise you every step of the way.

Group bio sample text:

Headquartered in [location], [firm name] provides wealth management services to successful individuals, families, and businesses

Dedication to our clients, a holistic approach to wealth management and qualified plans, and a passion for giving back to our community — these are values that all of us at [firm name] have honored for decades. We are committed to helping our clients manage the unique challenges of wealth and navigate new financial opportunities.