

Precision prospecting: Maximizing your LinkedIn network

Use the free features on LinkedIn to shift your prospecting from simply asking whom your clients know, to uncovering how they know them – unlocking powerful introductions that drive real opportunities.

Proactively identify prospects ahead of upcoming client meetings

By asking your current clients to make warm introductions, you can boost engagement, quickly build rapport and turn conversations into relationships.

Step 1: Identify client connections.

Review your client's LinkedIn profile and click on their connections to look for prospects.

Step 2: Filter prospects.

Use filters to narrow down high-potential prospects.

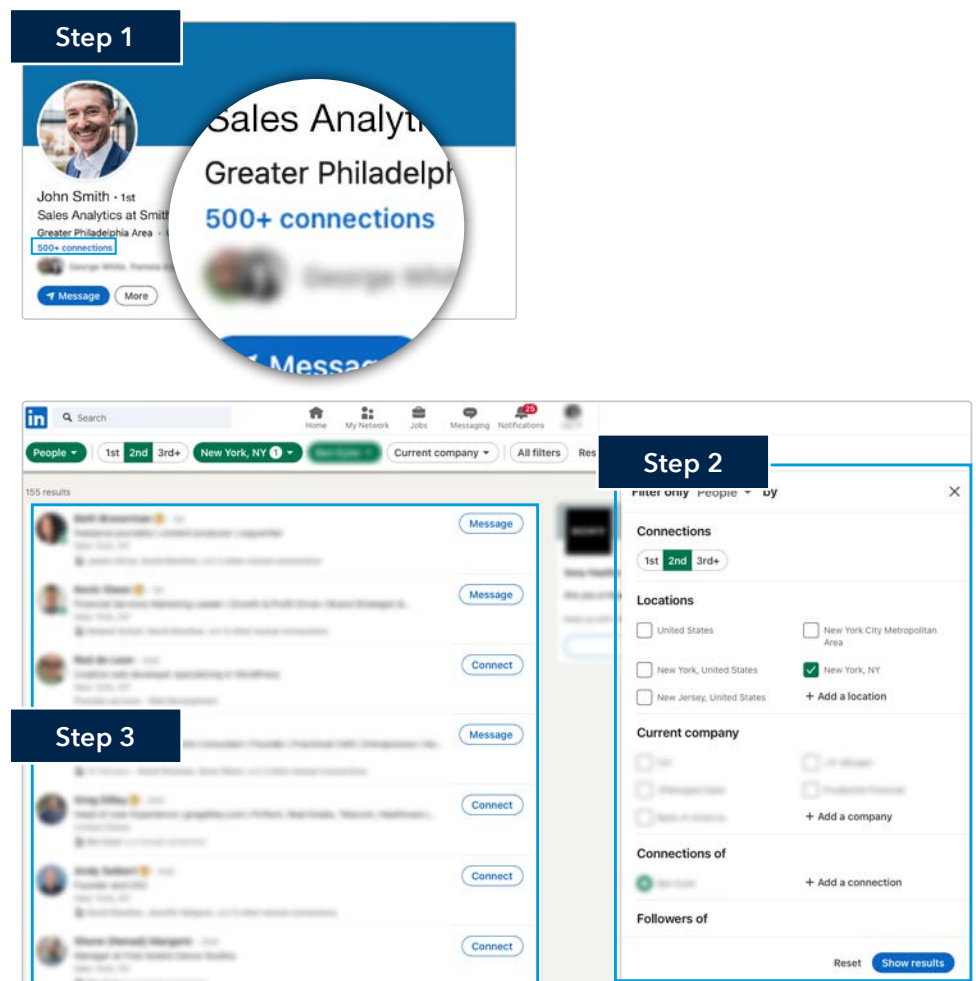
Scroll down to access all available filters, including:

- Connections (select 2nd degree)
- Locations
- School

Step 3: Review profiles.

Explore profiles of potential prospects, focusing on background, mutual connections and interests.

Download prospective clients' profiles as a PDF to review at upcoming client meetings. (See page 3 for more details.)



Tap COIs for business owner introductions

Leverage your center-of-influence LinkedIn networks to find potential business-owner clients. Use LinkedIn's filters to target connections by location, industry or other criteria, focusing your outreach on prospects whose needs and interests align with your capabilities.

Step 1: Start your search.

Type in "business owner" at the top of LinkedIn.

Step 2: Go to All filters.

Step 3: Scroll down to

"Connections of." Enter your COI's name to narrow the search to business owners they know.

Step 4: Refine your search.

Use additional filters to narrow your results based on the types of business owners you want to meet.

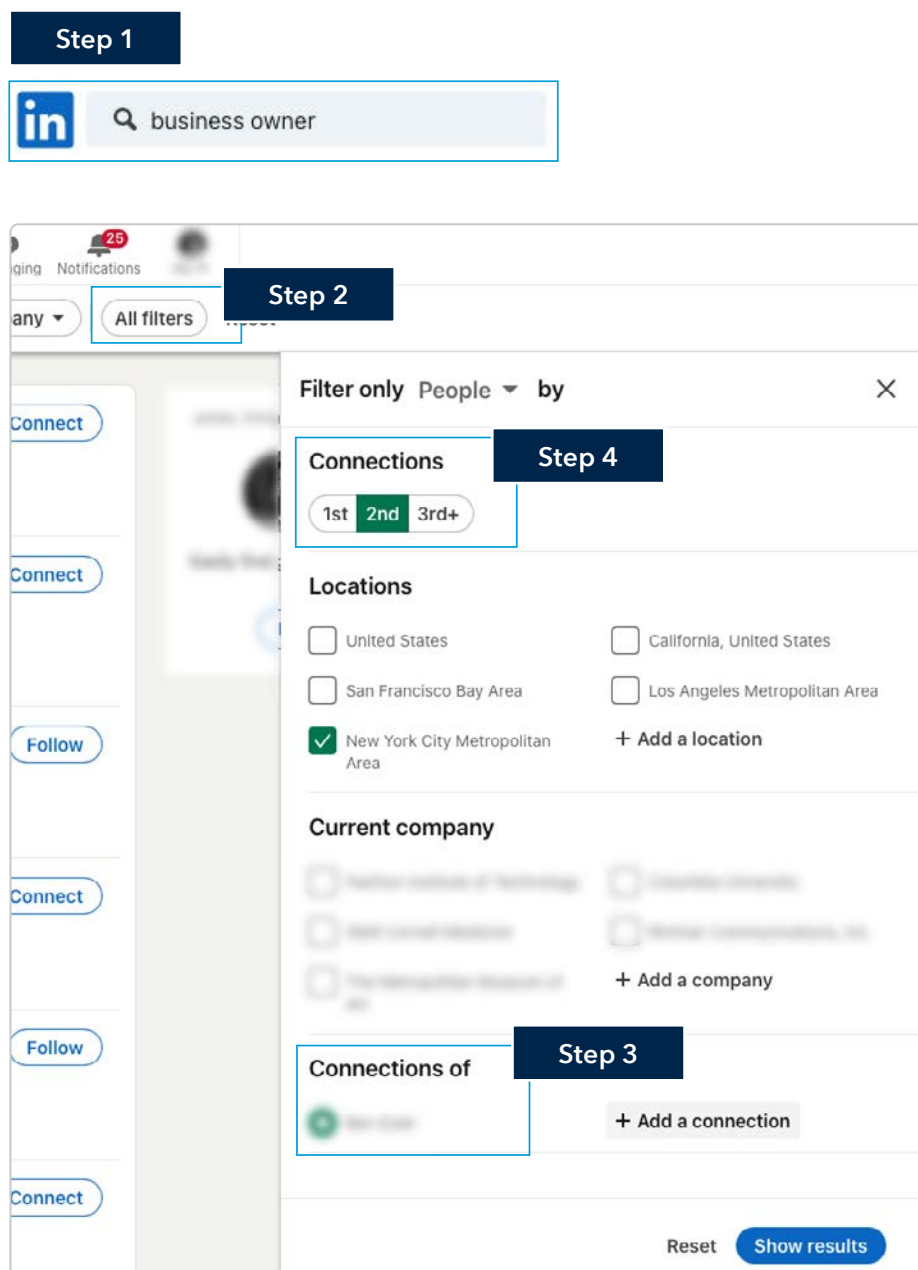
Scroll down to access all available filters, including:

- Connections
- Industry
- Service categories

Save a PDF of the prospect profiles to review during COI meetings. (See page 3 for instructions.)

Take the next step.

- Review profiles for the connections to whom you'd like to be introduced.
- Ensure that your COIs clearly understand your value proposition so they can articulate it when introducing you to business owners. Provide them with a short, memorable elevator pitch they can easily relay to prospects.



Engage next gen wealth

Research shows over half of advisors* have limited or no contact with clients' children or beneficiaries. By engaging future decision-makers now, you can secure long-term relationships with clients and their family members.



Step 1: Identify opportunities.

Review upcoming client meetings and consider discussing their children or beneficiaries to introduce legacy planning.



Step 2: Find beneficiary information.

Use existing records (e.g., individual retirement account or 401(k) designations) to identify children or key family members for targeted outreach.



Step 3: Connect on LinkedIn.

Search for these beneficiaries on LinkedIn and build early relationships to position yourself as their future advisor.



Step 4: Involve beneficiaries.

Encourage clients to involve their children in wealth management discussions, reinforcing your value to the family.



Download prospect profiles from LinkedIn

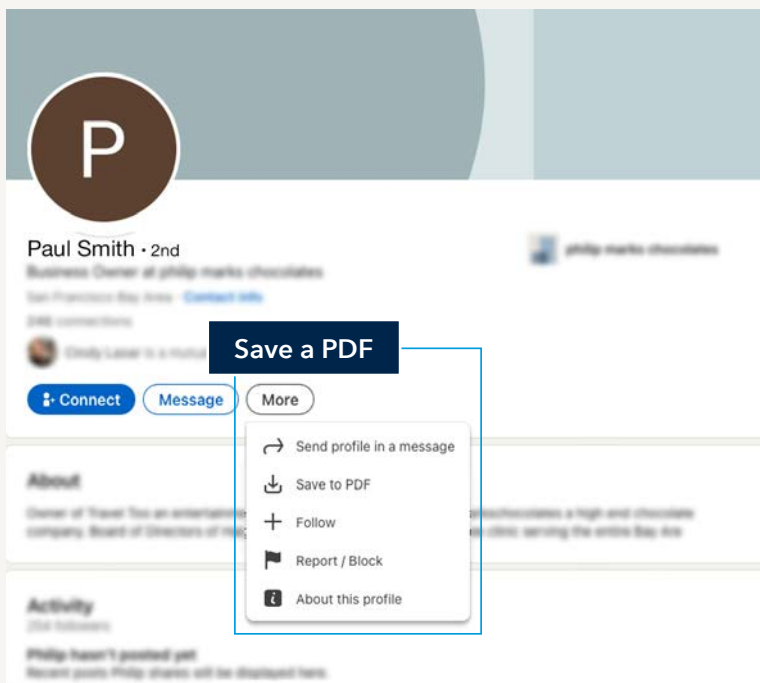
Saving profiles as a PDF helps you review key prospect details with clients and COIs.

1. Go to the profile: Navigate to the profile you want to save as a PDF.

2. Click on "More": On the profile page, look for a button labeled "More" (usually near the person's profile picture and name). Click it.

3. Save: From the dropdown menu, select "Save to PDF."

The profile will be downloaded as a PDF to your computer.



* Source: "Cerulli Finds Just 19% of Investors Use Their Parents' Advisor," Cerulli Associates, November 14, 2023.

Target key employees at large companies

Unlock the power of targeted prospecting by focusing on key employees within companies where you already have connections. By delivering tailored solutions that align with their stock options, retirement plans or financial goals, you'll position yourself better to be the advisor company executives trust for their financial needs.

Step 1: Search familiar companies.

Use LinkedIn search to enter the name of a company where you have client relationships.

Step 2: Select "People."

Step 3: Refine your search.

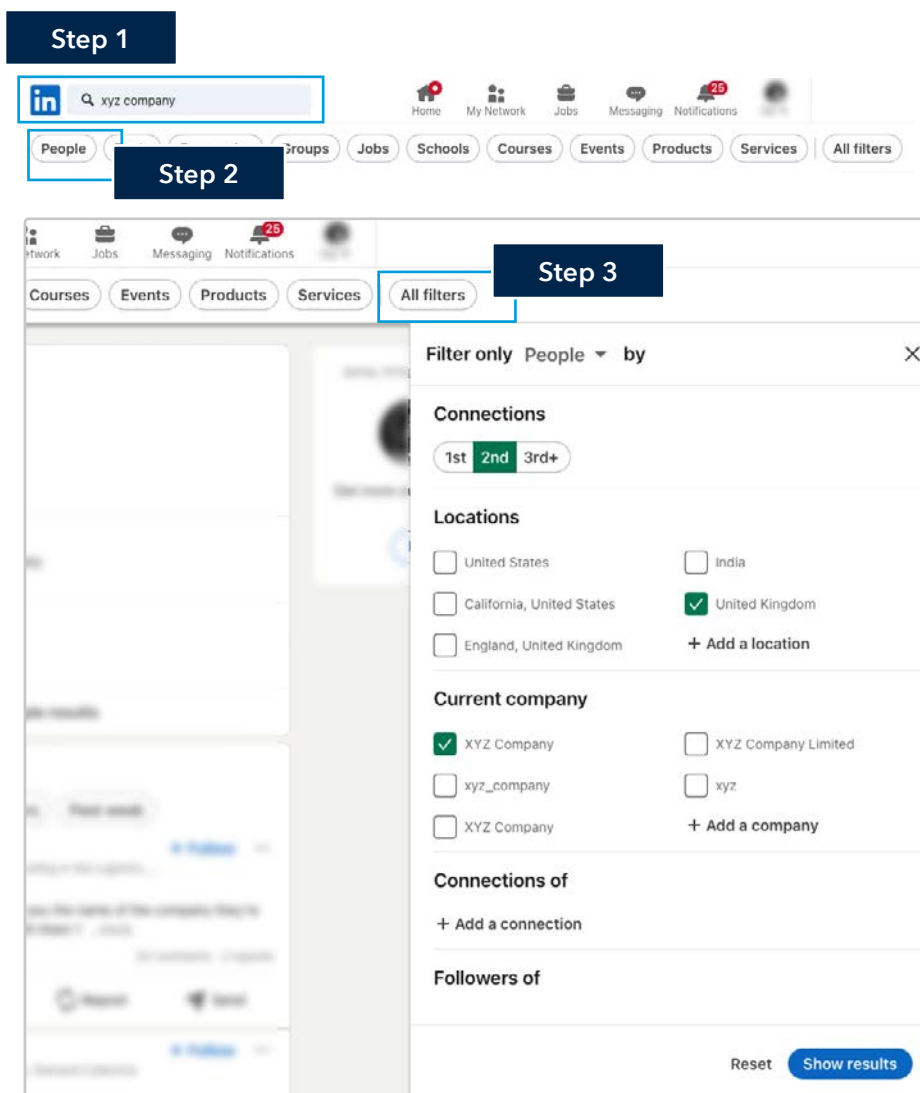
Go to All filters to narrow your search.

Scroll down to access all available filters, including:

- Connections
- Current company
- Locations
- Keywords like "President," "Chief," or "Director"

Take the next step.

Connect with prospects and follow up with a personalized email. Use your existing company relationships to build rapport or to ask for introductions.



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