



GETTING MORE BUSINESS WITHOUT COLD CALLS

Building a Brand on LinkedIn



Building a strong and recognizable brand on social media is more crucial than ever. In fact, branding consistency can boost revenue by up to 20%, and brands have seen a 96% increase in conversion rate with emotional brand storytelling efforts.¹

For retirement plan advisors, platforms like LinkedIn offer a unique opportunity to stand out, start storytelling to their audience, and build deeper connections with potential clients.

Great Gray Trust Company's goal is to help you grow confidently. Our expertise goes beyond acting as trustees for Collective Investment Trusts (CITs); we're your go-to resource for building and enhancing your practice holistically.

We've made significant investments in our social media focused on organic growth, and we're here to share tried-and-true tips and tricks you can implement into your own LinkedIn account.

Branding consistency
can boost revenue
by up to

20%

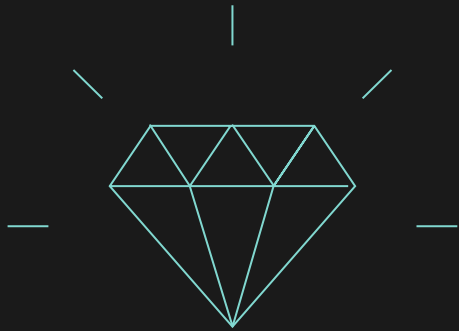
96%

Increase in conversion
rate with emotional
brand storytelling efforts.

¹ Branding Statistics (2024): Awareness, Recognition & Trends, 21 Fresh Statistics On the Importance of Branding

Crafting a Consistent and Authentic Brand

Consistency is key to successful social media branding. Your profile should offer a cohesive message across all touchpoints—your LinkedIn profile, posts, and interactions should align with your and your firm's core values and expertise.



First, start by defining your *unique value proposition*:
What sets you apart from other advisors?

Whether it's your in-depth knowledge of retirement planning, personalized service, or innovative investment strategies, make sure this is clearly communicated through your content.



TIP:

Take a pause before you post a piece of content and ask yourself—how does this align with a key theme that I want to be known for?



TIP:

Share a familial-based update at minimum quarterly. Rather than posting a family reunion photo, tell a story of your first family reunion, and tie it back into why you are passionate about retirement planning.

Authenticity is equally important.

Share personal insights, success stories, and behind-the-scenes looks at your firm.

Authenticity builds trust, and trust is the cornerstone of any successful advisory relationship with your plan sponsors.

Let your personality and values shine through your posts and be transparent about your journey and the expertise you bring.

Here's an example:

Planning for retirement is much like organizing a family reunion—it takes foresight, organization, and a lot of heart. If you're thinking about your plan participant's future, and how they can make the most of their time with family, let's talk about how we can make your vision a reality together.

Humanizing Your Brand

Sharing content that reveals the human side of your practice—such as personal anecdotes, client success stories, or even challenges you’ve overcome—can create a deeper connection with your audience than templated, generic content.

Vulnerability can be a powerful tool; showing your genuine personality helps potential clients relate to you on a personal level. This approach not only differentiates you from the competition but also builds a foundation of trust and empathy.

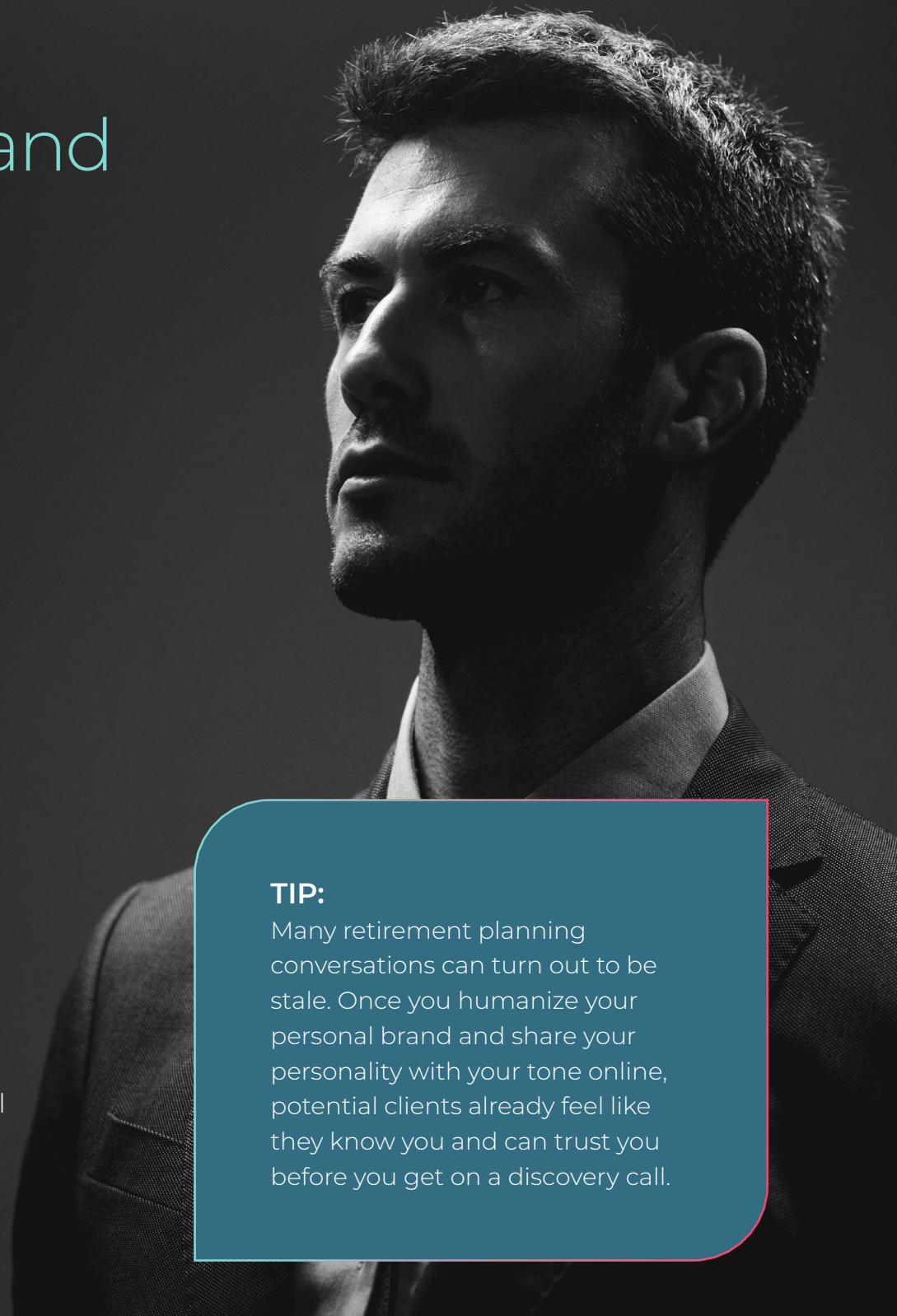
People want to do business with individuals they feel they know and can trust. After all, you aren’t just selling your lineups. You’re representing excellent client service, reliability, and the possibility of brighter financial futures for their participants.

By letting your personality shine through your content, you break down barriers and make your brand more approachable.

For example, sharing a story about how you helped a plan sponsor think about their plan differently with guaranteed income, or discussing a recent professional challenge you navigated can make your brand more relatable and engaging.

TIP:

Many retirement planning conversations can turn out to be stale. Once you humanize your personal brand and share your personality with your tone online, potential clients already feel like they know you and can trust you before you get on a discovery call.



Engaging Your Audience with Value-Driven Content

Creating valuable content is crucial for engaging your audience and establishing yourself as a thought leader. On LinkedIn, focus on sharing industry insights, practical tips, and case studies that demonstrate your expertise.

Consider using a mix of content formats —



Articles



Infographics



Short videos
to keep your
audience engaged

TIP:

For instance, you might post a weekly market update or a video explaining complex retirement strategies in simple terms with easily digestible analogies. This not only helps in building your brand, but also encourages interaction and fosters community engagement. These short-form videos are key to getting those in your network to re-share content without much lift on their end.



Leveraging LinkedIn for Lead Generation

LinkedIn isn't just a platform for showcasing your expertise; it's also a powerful tool for lead generation.



Start by optimizing your profile to attract your ideal clients.



Use keywords related to retirement planning, 401(k) advising, and financial advisory services in your headline, summary, and experience sections.



Additionally, actively engage with your network by commenting on posts, joining relevant groups, and sharing your insights.

Rather than comment a two-word suggested response that every other commenter has done to a company milestone, read and acknowledge it thoughtfully, and subtly weave in keywords about your expertise if applicable.

TIP:

Tip: Dedicate 15 minutes a day to personalized engagement on LinkedIn with current clients. Regularly comment and react to their posts with thoughtful insights or congratulatory remarks.



Take Your Leads off the Platform: Integrate Email Marketing Drip Campaigns

Once you've attracted potential leads on LinkedIn, your goal should be to get them engaged with you beyond the social media platform.

TIP:

Add a call-to-action button on your LinkedIn profile to allow users to subscribe directly to your email marketing content. This tool engages your prospects with your thought leadership on autopilot, and allows you to gauge your prospects who are invested in your insights.

Dillon Smart CRPS®, CPFA®, AIF® • 1st
Retirement Plan Advisor at Olbus Retirement

New York • [Contact info](#)

500+ connections

+ Follow

Message

Join Mailing List

More

In order to do so, you can use email marketing to nurture these relationships further. After connecting, invite them to subscribe to your newsletter or email list via LinkedIn InMail.

Use **drip campaigns** to deliver valuable content over time, such as breaking out informative articles into segmented pieces, short-form video market updates, and exclusive insights. Each of your emails should link users back to these LinkedIn posts to drive further engagement with the posts.

This approach helps to maintain engagement and build a relationship with potential clients, moving them along the path from initial interest to building trust to becoming a loyal client that refers your practice to other plan sponsors.



Optimizing Your Social Media Strategy

To maximize the effectiveness of your social media efforts, regularly assess and adjust your strategy. Use LinkedIn's analytics tools to track the performance of your posts and understand what resonates with your audience. Pay attention to metrics like engagement rates, click-through rates, and follower growth.

To measure the success of retirement plan advisors in building their brand and resonating with prospects and clients on LinkedIn, consider focusing on these metrics rather than the short-term, vanity metrics:

ENGAGEMENT RATE:



This metric reflects the level of interaction your posts receive. High engagement (likes, comments, shares) indicates

that your content is resonating with your audience and fostering meaningful connections. For example, Great Gray consistently performs at a higher engagement rate on LinkedIn than our top competitors—and it's the top metric we track on a monthly and quarterly basis to evaluate the efficacy of our content.

CONNECTION GROWTH:



Tracking the number of relevant connections added over time can help show how effectively you're

expanding your professional network. If you are focused on a certain region, you can analyze your follower growth in that particular city or state. Or, you can analyze your followers based on job title to evaluate this metric more closely. A steady increase in targeted, relevant connections can suggest that your brand is gaining traction and credibility online.

PROFILE VIEWS:



Monitoring profile views and direct inquiries is crucial. An increase in profile views often indicates interest

in your professional background and expertise—and you can directly correlate your appearances at conferences or with a particularly resonant post based on increases in profile views during particular time periods. Additionally, receiving direct messages or connection requests from potential clients or partners can be a strong indicator that your brand is resonating with them.

These data points will help you refine your approach and ensure that your content remains relevant and impactful for your long-term growth goals.

Key Takeaways for Strengthening Your Social Media Branding

In summary, building a strong brand on social media requires a blend of consistency, authenticity, and strategic content creation for retirement plan advisors.

By humanizing your brand, sharing content that reflects your personality and values, and leveraging LinkedIn effectively, you can enhance your visibility, engage with your target audience, and ultimately grow your retirement plan advisory practice—all for little to no budget.

We're here to support you every step of the way. We are a strategic ally, offering a broad network and valuable thought leadership within the retirement ecosystem to help you achieve your practice's growth goals confidently.



Reach out to our **Sales Team** today. With a deep understanding of the CIT landscape and a passion for building lasting relationships, they are the force behind Great Gray's expansion and client success. Always listening, learning, and delivering value, our Qualified Plan team is poised to help advisors select the CIT fund to complement their investment lineup.



ABOUT GREAT GRAY TRUST COMPANY

At Great Gray we believe in – and are driven by – growth. In continually expanding and transforming retirement solutions through technology that streamlines, innovation that unlocks potential, and a mindset that reaches far beyond the status quo.

Growth that brings new efficiencies, new possibilities, new goals to our customers.
And to their customers.

From acting as a trustee for CITs, where we transcend oversight by working to ensure assets are not just managed but maximized, to delivering modern approaches like our onboarding tool boardingpass™, we never stop looking for smart ways to innovate and grow our industry. And ultimately, bring greater value to those we serve.

Always listening, learning, applying new concepts on top of a long-standing reputation for fiduciary strength and expertise. Creating what's next from a critical foundation of discipline and trust.

Empowering our industry, customers, and ourselves to **grow confidently**.

Great Gray Trust Company, LLC Collective Investment Funds ("Great Gray Funds") are bank collective investment funds; they are not mutual funds. Great Gray Trust Company, LLC serves as the Trustee of the Great Gray Funds and maintains ultimate fiduciary authority over the management of, and investments made in, the Great Gray Funds. Great Gray Funds and their units are exempt from registration under the Investment Company Act of 1940 and the Securities Act of 1933, respectively.

Investments in the Great Gray Funds are not bank deposits or obligations of and are not insured or guaranteed by Great Gray Trust Company, LLC, any bank, the FDIC, the Federal Reserve, or any other governmental agency. The Great Gray Funds are commingled investment vehicles, and as such, the values of the underlying investments will rise and fall according to market activity; it is possible to lose money by investing in the Great Gray Funds.

Participation in Collective Investment Trust Funds is limited primarily to qualified retirement plans and certain state or local government plans and is not available to IRAs, health and welfare plans and, in certain cases, Keogh (H.R. 10) plans. Collective Investment Trust Funds may be suitable investments for plan fiduciaries seeking to construct a well-diversified retirement savings program. Investors should consider the investment objectives, risks, charges, and expenses of any pooled investment fund carefully before investing. The Additional Fund Information and Principal Risk Definitions (PRD) contains this and other information about a Collective Investment Trust Fund and is available at www.greatgray.com/principalriskdefinitions or ask for a free copy by contacting Great Gray Trust Company, LLC at (866) 427-6885.

Great Gray and Great Gray Trust Company are service marks used in connection with various fiduciary and non-fiduciary services offered by Great Gray Trust Company, LLC.

©2025 Great Gray Trust Company, LLC. All rights reserved.