

Writing the story of your life

A marketing bio helps prospects get to know you and your team

By Fiona Collie | February 16, 2012 14:00

A well-written professional biography can give you a head start in building trust with prospective clients — before you meet them.

A bio, for yourself and for your team, shows prospective clients exactly how your business works, says Sylvia Garibaldi, founder and principal at SG and Associates in Toronto.

Writing your bio is a matter of much more than jotting down the number of years you have been in the business. It is a tool for establishing credibility by outlining your qualifications, your mission statement and how you help clients achieve their financial goals.

Below are five tips to help you create a current and useful biography to include in your marketing materials:

> Post a picture

When you include a photograph with your bio, you let prospects attach a face to the name.

A photo relays your professionalism and trustworthiness to the reader, Garibaldi says, and helps a prospect relate to you.

Be sure to use a professional photo, says Garibaldi, who recommends a 3- by 4-inch headshot.

> Keep it current

Update the biography regularly to make sure it is always current and relevant.

Review the bio every six to 12 months to ensure all information is up to date, Garibaldi says. Revise it any time there has been a change in your business.

> Shine a spotlight on team members

Include individual bios of your team members in your marketing materials.

Write out a separate biography for every advisor and associate advisor on the team, Garibaldi says. Each has a unique skill set that prospects should know about.

> Show that you're a team

Write a shorter biography about the team as a whole to give prospects and clients a sense of your practice. Be sure to include a team photo.

Garibaldi recommends a two-paragraph team bio, which can be included with the other biographies in a brochure or in the "About Us" section of your website. The brief description should include the

company's mission and vision proposition, the clients you serve, how long the business has existed and what makes your team different from other advisory firms.

> Send copies to prospects

Showing your bio to prospects can help you to start establishing a relationship immediately.

Make sure your bio is posted on your website, Garibaldi says, as the majority of prospects will do a search for you online before meeting with you.

As well, if you have arranged a meeting with a prospect, she says, send him or her a copy of your bio along with an agenda and any other necessary materials. Doing so will establish credibility and trust with a prospect and demonstrate your professionalism.

This is the second of two articles on preparing professional biographies.