



# LinkedIn Profile Checklist for Financial Professionals

## PHOTOS

Profile - Select a photo in which you are easily recognizable and has a clean/simple background. **400 x 400 pixels**

Cover - Add color and personality to your profile with a photo that reflects your interests, organization or region. **1,584 x 396 pixels**

## HEADLINE

Go beyond your job title to tell people who you are (in 120 characters or less).

## ABOUT/SUMMARY

Tell your story, including professional accomplishments as well as (limited) personal information and outside interests.

Remember, what you do for work is not your whole story.

## ACTIVITY

Created automatically based on your LinkedIn activity (likes, shares, comments, etc). See page 2 for ideas.

## EXPERIENCE

List the positions you have held during your career, not just your current job. The goal is to document your experience, as well as to connect with colleagues from past positions. For the most recent consider including an overview and notable accomplishments.

If you have held multiple positions at one organization, consider listing each, demonstrating career advancement.

When possible, connect to the correct organization's LinkedIn Company Page (careful of like-sounding businesses). When successfully linked, a logo will appear on your profile.

## EDUCATION

Share your educational experiences including college, advanced degrees and professional education. Include high school if you feel it will help LinkedIn make additional connections.

## LICENSES & CERTIFICATIONS

Include professional licenses as well as any certifications you feel will enhance your profile.

The screenshot shows a LinkedIn profile for Anna Ripae. The header includes the LinkedIn logo, search bar, and navigation icons. The profile picture is a circular photo of a woman with dark hair. The cover photo is a landscape image of a person walking on a path in a forest. The profile name is Anna Ripae, with the headline "Experienced community banker and team leader" and location "Greater Boston Area". It shows 500+ connections and a "Contact info" link. The "About" section describes her as a college student with a passion for business and math, who worked at a community bank and is involved with Girl Scouts. The "Activity" section shows 670 followers and two recent posts: "Such a great project!" and "Love working with First County Bank as their team continues to find new...". The "Experience" section lists three roles: Executive Vice President & Chief Operating Officer at Squared Up Bank (2005-Present), Senior Vice President - Retail & Operations at Growth Bank (1999-2014), and Senior Vice President at Downtown Bank (1998-1999). The "Education" section lists Stonier Graduate School of Banking / Wharton School of Business (2012-2014) and State of the City University (BA, Finance, 1982-1986). The "Licenses & Certifications" section lists Certified Financial Marketing Professional (CFMP) from the Institute of Certified Bankers (ICB) and Competent Communicator from Toastmasters International.

## VOLUNTEER EXPERIENCE

Share where you contribute your time and expertise both within, and beyond, the financial services industry.

## SKILLS & ENDORSEMENTS

Allow members of your professional community to validate selected career skills through endorsements.

Include, at minimum five skills, which support your professional goals and expertise. For example: retail banking, commercial banking, leadership, strategic planning, commercial lending, asset management.

## RECOMMENDATIONS

Invite those who have worked with you in the past to share their experience through recommendations.

Strengthen relationships by leaving recommendations for vendors & past colleagues, but consult with Human Resources before recommending current employees at your organization.

## INTERESTS

Connect with members of your community, learn from industry experts and engage in conversations by joining Groups, and following individuals and organizations.

## WHAT'S NEXT

### Make Connections

Click “My Community” to see people you may know on LinkedIn (based on the information you’ve shared).

Start building your network by clicking “Connect.”

**Pro Tip:** Your invitation is more likely to be accepted if you include a personal note.

### Participates

Engage with members of your community by reading, reacting and commenting. You have several ways to respond:



**Pro Tip:** Get into a LinkedIn habit by visiting for 15 minutes everyday and reacting to at least two items.

### Share

Contribute to the conversation by sharing articles of interest, news from your financial institution and professional news.

Remember to avoid items that are out-of-date, or overly personal.

**Pro Tip:** Check out your organization’s Page for news & other items that are “ready to share.”

### Analyze

Check your progress by visiting [www.linkedin.com/me/profile-views](http://www.linkedin.com/me/profile-views) to see how you are doing!

91 profile viewers in the past 90 days  
**+133%** since last week

**Pro Tip:** Considering upgrading to Premium? Maximize your use of LinkedIn before upgrading to paid versions.

### Volunteer Experience

**Troop Leader**  
Girl Scouts of Eastern Massachusetts  
Sep 2011 – Present • 8 yrs 1 mo  
Children

**SUM Program Committee**  
Massachusetts Bankers Association

**Fundraiser/Rider**  
Pan-Mass Challenge  
Jan 2016 – Present • 3 yrs 9 mos  
Health

### Skills & Endorsements

Banking · 31

Endorsed by David Rockefeller and 1 other who is highly skilled at this

Endorsed by Scrooge McDuck and 13 other mutual connections

Retail Banking · 16

Endorsed by Georgina Banks and 1 other who is highly skilled at this

Endorsed by Andrew W. Mellon and 13 other mutual connections

Commercial Banking · 10

Endorsed by Patricia Bateman and 13 other mutual connections

Endorsed by 2 of Anna's colleagues at Squared Up Bank

Show more

### Recommendations

Ask for a recommendation

Recommend Anna

Received (1) Given (2)

**Jessan Hoan**  
Senior Vice President  
Retail Banking at  
Squared UP Bank  
May 1, 2019 Jessan worked with  
Anna at the same company

Anna is a strong leader who knows how to connect teams and encourage collaboration.

As an experienced community banker, she understands the challenges organizations face to adopt new technologies within the retail space, while still providing individual personal service our customers have come to expect.

### Interests

**Sallie Krawcheck**  
CEO and Co-Founder of Ellevest  
2,552,990 followers

**State of the City University**  
5,066 followers

**Sundin Associates**  
468 followers

**Squared Up Bank**  
2,050 followers

**American Bankers Association**  
65,716 followers

**Massachusetts Bankers Association**  
244 members

See all

For more tips and other marketing insights, visit [SundinInc.com](http://SundinInc.com)