

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.



About

As a college student with a passion for business and math, a career in banking seemed like a logical choice. What I didn't know at the time was the impact working at a community bank would have not just on me, but also the community I live in. During my career, I have had the privilege to work with teams of committed banking professionals who are invested in serving the needs of individuals, families and

 $Through \ my \ involvement \ with \ Girl \ Scouts \ of \ Eastern \ Massachusetts, I \ have \ been \ given \ the \ opportunity$ to pass along my love of science, math & technology to my two daughters, as well as the next generation of women leaders.

Activity

670 follo



Such a great project!



Love working with First County Bank as their team continues to find new... Anna shared this

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.

Experience



Executive Vice President & Chief Operating Officer

Squared Up Bank

2005 - Present • 14 vr

As Chief Operating Officer I am charged with overseeing multiple departments including Retai Banking, Electronic Banking, Operations, IT, Accounting, Marketing and Human

In 2019, I worked with internal teams and fintech partners to launch online deposit

Senior Vice President - Retail & Operations Growth Bank

1999 - 2014 • 5 yrs



Senior Vice President Downtown Bank

1998 - 1999 • 1 y

Education



Stonier Graduate School of Banking / Wharton School of Business Graduate

2012 - 2014



State of the City University

BA. Finance 1982 - 1986

Licenses & Certifications



Certified Financial Marketing Professional (CFMP) Institute of Certified Bankers (ICB)



Competent Communicator Toastmasters International



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.

SUM Program Committee Massachusetts Bankers Association Fundraiser/Rider Pan-Mass Challenge Jan 2016 – Present + 3 yrs 9 mos 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 connection (V) 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 2 of Anna's colleagues at Squared Up Bank Endorsed by Patricia Bateman and 13 other

Show more ~

encourage collaboration

Ask for a recommendation

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

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

Recommend Anna

Volunteer Experience

Recommendations

Senior Vice President

Retail Banking at

Received (1)

Troop Leader

Sep 2011 - Present Children

Girl Scouts of Eastern Massachusetts

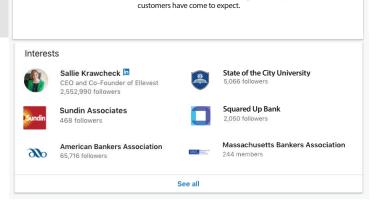
☐ RECOMMENDATIONS

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 NFXT

Make Connections

Click "My Community" to see people you may know on Linkedln (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

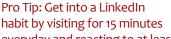
Engage with members of your community by reading, reacting and commenting. You have several ways to respond:











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 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.

For more tips and other marketing insights, visit SundinInc.com