Financial Advisor Name,

Kit 4

**Financial Advisor Title**

**Professional Experience**

Start with your name, current role on the team and brief statement of what you do.

Next, you may wish to provide a sentence or two about why you do what you do.

Then, provide relevant information such as years of experience and previous companies you’ve worked with.

**Education**

Provide information regarding your specialized industry designations and certifications.

* If you are a CFP, include the following paragraph:

[Advisor] is a Certified Financial Planner (CFP), so you can be sure that he provides expert and professional financial planning services. To earn the CFP designation, [Advisor] had to complete an approved educational program, pass a rigorous examination and meet stringent experience requirements. [Advisor] also adheres to a professional Code of Ethics and he fulfills annual continuing education requirements to remain aware of current planning strategies and financial trends.

* If you have any other designations directly related to a niche, you are actively trying to grow be sure to showcase it here.

Provide information regarding any other education you may have (i.e., University or College).

**Personal Information**

Provide information related to your hobbies, recreational interests, volunteer positions, boards, family, etc.

Only share information you are comfortable with.