

# GENERAL TIPS FOR STANDARD BIOGRAPHIES

## HOW TO WRITE A BIO

If you are considering adding a personal biography to your website for yourself and any of your team members keep in mind the following best practices. **A good bio should always tell the following in an engaging and concise way:**

- Who you are
- What your expertise is - Focus on the most relevant information for your target market
  
- Begin writing your bio with your first and last name.
- Mention any associated brand name you might use.
- State your current position and what you do.
- Include at least one professional accomplishment.
- Describe your values and how they inform your career.
- Briefly tell your readers who you are outside of work.
- Consider adding humor or a personal story to add flavor to your professional bio.

A biography can include information such as:

- Your professional details: i.e. industry experience and years in industry
- Specialties in the business, or niche markets you serve
- Your qualifications: i.e. education, publications, awards & distinctions, designations
- Your strengths and beliefs in the business or industry: what makes you unique?
- Your community involvement: importance and relevance to job, any non-profit work, hobbies and interest (can be effective if relevant to target a special market niche)
- Professional photography of yourself, team or office
- A link to LinkedIn page, Blog pages, or other social contacts

**Consider adding videos.** Let's face it: words can only go so far. To really get to know someone, you need to hear the person's voice and observe the person as he or she talks. Enter videos. These don't need to be professional videos that you sink a ton of cash into. Smartphone and tablet video cams are high quality enough to produce the desired effect. Just make sure you have good lighting and sound. Simply give people the opportunity to introduce themselves (Keep it under 2-3 mins max).

## BEST PRACTICES

- Use plain language – most Canadians literacy for word comprehension is grade 8 and for financial language it is on average at a grade 6 level
- **Keep it Short to Keep People Interested:** 79% of users scan the page instead of reading word-for-word
- Be selective about the details you include. Consider using bullets, short paragraphs and bolding important information.

# SAMPLE BIOGRAPHIES

## Sample 1: Business

John Smith has been helping families and small business owners for over 15 years. With a focus on Retirement, Estate and Tax Planning using both investment and insurance strategies, John has helped his clients build achievable plans for growing and protecting their financial future. John has a degree in Economics from ABC University and holds a Certified Financial Planner designation and is a Chartered Financial Accountant.

## Sample 2: Overview

Jennifer Kettle

- Certified Financial Planner (CFP)
- Registered Financial Planner (RFP),
- BA Honours Economics, Queens University
- MBA, Western University - Ivey Business School

Jennifer takes great pride in providing her clients objective advice and helping them build achievable plans to meet their goals. Her broad knowledge of personal taxation, investing, and retirement planning enables her to provide strategies that help her clients be prepared and feel secure about their financial future.

Jennifer and her husband Adam reside in Toronto with their two children, Zack and Chloe and Buster the dog.

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## Sample 3: Friendly and Conversational

Hi! I'm Jason Smith, I'm a Certified Financial Planner and I have built my practice over the last 15 years by giving my clients objective advice that has been tailored to their needs and goals. I strongly believe in communicating in clear and simple language that all my clients can understand. Myself and my team specialize in helping...

- retirees and pre-retirees within 5-10 years of retirement who want to retire with confidence and
- every day people like you and me who may not be thinking about retirement quite yet, but have other goals that require planning, like buying a house, having a family, funding the kids' education, or simply taking more vacations while still staying on track and protecting your financial future.

I'm the oldest of 4 siblings and grew up in a single parent household where I learned the importance of financial security and protection. Today I live a very busy life here in Calgary with my wife Lisa and our 3 sons.

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# CREATIVE INTERVIEW-STYLE BIOGRAPHIES

## Why Good Bios Are Important for a Professional

Alright, I know what you may be thinking ... *So what? It's just a bio.* I mean, how many people read professional bios, anyway?

The answer: A lot of people. More importantly, though, there's no way to tell exactly *who* is reading it -- and you always want it to be ready for when the *right* people to come across it. And when they do, you want it to catch their eye. In a good way.

**People will read your professional bio. Whether they remember it, and whether it makes them care about you, is a matter of how well you present yourself to your intended audience.**

This is a template that can help you provide more authentic, casual and engaging biographies for your team. The goal of the questions you choose is to have some variety between each employee and allow the questions to generate interesting answers that share great information with the audience. Your team should choose about 3-5 questions each, that they can elaborate on and that gives them the opportunity to tell the viewer who they really are.

We want to....

1. Ask questions that highlight a problem in your industry, and how your team member can help
2. Express themselves as real people, and not drones.
3. Share their values and vision for how they're making things better.

**Basic info: The introduction: Have a good photo or two, or three.... Professional, and perhaps one more casual and genuine.**

## MEET <PERSONS NAME, TITLE>

- Name:
- Company Role / designations:
- Length of time with Company:
- What are your credentials/past experience, for working in your position?
- Contact information, social profiles
- Favorite quote:

## QUESTIONS TO CHOOSE FROM: (or make up your own)

- What is something that client have to deal with that you want to fix?
- What do you like most about working at [your company]?
- What are the values that drive you?
- What do you enjoy doing when you are not working?
- If you could write your own job title that best describes what you do here, what would it be?
- What do you enjoy about the work you do?
- What volunteering or passion projects do you do outside of work?
- Who is someone you admire, and why?
- What's a typical day like for you?

- Do you have any skills or talents that most people don't know about?
  - If you could be anywhere other than here, right this minute, where would you be? (Don't overthink it!)
  - Flashback to when you were 10 years old. What do you want to be when you grow up?
  - Finish this sentence. On Sunday mornings, you can usually find me...
  - How do you want people to remember you?
  - What do you think are the best skills that you bring to your job?
  - Name three words that you describe you.
  - What is at the top of your Bucket List?
  - What are you happiest doing, when you're not working?
  - Would you rather travel to the depths of the ocean, or into space – why?
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## SAMPLE BIOS FOR ADMINISTRATORS

Below is a sample template for assistants, along with some information we have gathered up that may be useful. We have put together sample advisor biographies, ideas and different templates you can use depending on your preference and “vibe” you want to show readers. You can just fill in the blanks with the team members details, remove or add what you like.

NAME is an [Administrative Assistant] at [BUSINESS NAME] - [CITY/LOCATION] office.

Joining the team in [YEAR], NAME is a graduate of [NAME OF SCHOOL] where he/she studied Human Resources.

Not only handling the day-to-day office administrative duties, NAME works closely with our advisors, and is responsible for making the day-to-day business run smoothly by ensuring the office has the necessary supplies and equipment needed, frequently answering general office phone calls and assisting with the advisor duties, client meetings and business needs.

Away from the office, NAME enjoys [ENTER HOBBIES OR ACTIVITIES].

### Ideas to list:

- Hobbies, and/or achievements
- Family
- Pets
- Travel
- Charity involvement
- Volunteer work