How to use this biography template:

Your "About Me" page will be one of the most viewed pages on your website, but many advisors have trouble crafting a strong biography. Use these templates to help you create your own bio. These templates are easily customizable and make the writing process simple.

Version 1:

Everyone's economic and life situation is unique, and I keep that in mind when providing financial security advice. I believe that personalized service is essential when matching clients with the right financial security products and services.As a Financial Security Advisor, I am dedicated to learning about your personal goals. Together we will use them to build a financial security plan focused on your specific needs.

I understand my clients are in different stages of life: you might be purchasing a first home, financing a child's post-secondary education or planning for retirement. I believe a financial security plan must reflect your personal or business situation, and so will work to highlight the financial security products that best fit your goals. Once your custom-tailored financial plan is in place, we will continue working together to review achievements against your stated aims, and ensure you are comfortable everything is moving forward according to plan.

If you ever have questions about your plan or about specific financial products, contact us. We will set up a time to meet to review your needs and address any questions you may have. Contact us today.

Version 2:

A cornerstone of financial planning is the recognition that everyone's economic and life situation is unique. Personalized service is essential when matching clients with the right financial products and services.

A commitment to professionalism and the cooperative development of unique, personal goals forms the foundation of any strong financial plan.

A financial plan must reflect the stage of life its owner is in: whether purchasing a first home, financing a child's college education or planning for retirement. A plan must reflect its owner's personal or business situation, and highlight those financial products that best fit it. A custom-tailored financial plan must also be continually reviewed to measure its achievements against stated aims, and ensure the owner is comfortable everything is moving forward according to plan.

If you ever have questions about your plan or about specific financial products, contact me. We will set up a time to meet to review your needs and address any questions you may have. Contact me today.

Version 3:

One of the most important lessons I learned as a student at **[college/university]** is that becoming a great financial planner is all about understanding the needs of clients and recognizing that everyone's economic and life situation is unique.

While I've been helping my clients meet their financial goals for **[x number]** years now, that message has become even more apparent.I understand that my clients are the most important part of my firm and that personalized service is essential when matching clients with the right financial products and services.

Whether your current goals involve purchasing a first home, financing a child's college education or planning for retirement, I want to help you make the best decisions with your money. If you ever have questions about your plan or about specific financial products, contact me. We will set up a time to meet to review your needs and address any questions you may have. Working together, we will create a plan to meet your financial goals.

Version 4:

John Doe has more than **[x number]** years of experience working with affluent individuals, families and their closely held entitiesserving as a **[job title]**.

Prior to joining **[current firm]** in **[year you began working with current firm]**, John was a **[former job title and relevant experience]**.

John Doe is **[degrees, designations and/or awards]**. He is a member of the **[list any relevant associations and/or organizations].** John serves in a variety of community and professional activities and is currently involved with the **[list charities, non-profits or clubs]**. John graduated with a **[degree]** in **[major/concentration]** from **[University you attended]**.

Additional Resources:

How to Write an Effective Biography
Writing Your Bio/Profile for the Web
15 Tips for Writing a Professional Financial Advisor Biography