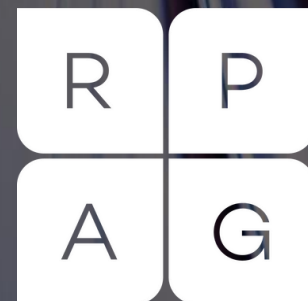


ROAD TO SUCCESS MINISERIES

SOCIAL MEDIA HIGHWAY

ASHLEY PASSOW
SR. MARKETING SPECIALIST



AGENDA

1. Why is social media important?
2. LinkedIn best practices
3. What should you be posting?
4. How to optimize personal and company branding
5. How to repurpose older content

IMPORTANCE OF SOCIAL MEDIA

- 1.A free way to expand your reach
- 2.Communicate with clients and prospects
- 3.Post helpful content that brings clients to you
- 4.Fosters trust with clients/prospects
- 5.Constant interaction
- 6.Networking
- 7.Positions you as an expert



LINKEDIN BEST PRACTICES

PROFILE OPTIMIZATION

- Use a professional headshot.
- Write a clear and engaging headline (not just your job title).
- Fill out the 'About' section with client-focused language.
- Include relevant skills and certifications.

NETWORKING TIPS

- Connect with clients, prospects, and industry peers.
- Personalize connection requests.
- Engage with posts by commenting and sharing insights.





Ashley Passow  (She/Her)

Empowering Businesses and Employees to Achieve Financial Wellness |
Retirement Plan Advisor | Fiduciary Specialist

Mission Viejo, California, United States · [Contact info](#)


988 followers · 500+ connections

Open to

Add profile section

Enhance profile

Resources

Tell non-profits you're interested in getting involved with your time and skills 
[Get started](#)


 RPAG

 UC Santa Barbara

About

As a dedicated retirement plan advisor, I specialize in helping businesses design, manage, and optimize their retirement plans to meet both organizational goals and employees' financial well-being. With a passion for fiduciary excellence, I work closely with plan sponsors to navigate the complexities of compliance, investment selection, and fee benchmarking.


What sets me apart is my client-focused approach. I believe every plan sponsor deserves a trusted partner to simplify the decision-making process and provide tailored solutions that prioritize their participants' best interests. Whether it's conducting fee benchmarking studies, educating employees about retirement savings, or optimizing plan design, I'm here to guide you every step of the way.




Home My Network Jobs Messaging Notifications ²

People | 1st 2nd 3rd+ United States ¹ Current company | All filters Reset


About 7,100 results

Michelle Lee  • 2nd
 VP, Human Resources at Markwins Beauty Brands
 United States
 Current: Vice President **Human Resources** at Markwins Beauty Brands
 Noah Strenn, MBA is a mutual connection


Connect

Gus Sanchez  • 2nd
 Senior VP Human Resources @ Whittier Trust | SHRM-SCP, SPHR®
 South Pasadena, CA
 Current: Senior Vice President **Human Resources** at Whittier Trust Company
 889 followers • Fred Barstein and Kameron Jones are mutual connections

Follow

Sharon Allen, SPHR SHRM-SCP  • 2nd
 VP of Human Resources
 Austin, TX
 Current: VP of **Human Resources** at American Association of Nurse Practitioners
 Allison Kaylor-Flink and Cory Thurston are mutual connections

Connect

Suzi Flores, MSHR  • 2nd
 VP, Human Resources USA
 Irvine, CA
 Current: VP, **Human Resources** US at Balt
 Kameron Jones is a mutual connection

Connect

Connect  Follow

Add a note to your invitation? ✕

Personalize your invitation to Michelle Lee by adding a note. LinkedIn members are more likely to accept invitations that include a note.

Add a note Send without a note

- 1st means you are connected to them
- 2nd means you have a mutual connection
- 3rd+ means they are connected to your 2nd connections or have no connections at all

Ashley Passow • You
Digital Marketer 🌐 | Adventure Enthusiast 🌍 | Socials Connoisseur 📱 | ...
3mo • Edited • 🔄

Hey everyone! 🙌 I am super excited to share that the recording of my Marketing with AI session from the **RPAG** Regional Summits is finally live on YouTube! ...more



Leveraging AI for Marketing Your Practice - Ashley Passow | 2024 Summit Sessions

youtube.com

👍❤️ [Profile] and 17 others

6 comments

👤 ▾ Like Comment Repost Send

Add a comment...



[Profile] • 1st
Supply Chain Specialist II

3mo ...

So informational! Great job Ashley!

Like · 🔄 1 | Reply · 1 Reply

Ashley Passow **Author**
Digital Marketer 🌐 | Adventure Enthusiast 🌍 | Socials Conn...

3mo ...

Thank you [Profile]!! I'm glad you enjoyed it! ❤️

Like | Reply

Ashley Passow • You
Digital Marketer 🌐 | Adventure Enthusiast 🌍 | Socials Connoisseur...
2w • 🔄

🏛️ Just finished jury duty for the first time, and it was such a unique experience. I always thought court cases would be like what you see on TV, but in reality, it's much slower and more methodical (and includes taking a ridiculous amount of notes).

😬 I was also chosen as the foreman, which was both challenging and rewarding. Leading a group to decide something as serious as guilt or innocence required staying calm, listening to different perspectives, and making sure everyone felt heard. It wasn't easy, but it really showed me what leadership looks like under pressure.

🙄 If you ever get called for jury duty (and have the means to serve), I'd encourage you not to flake on it. It's a neat experience that not only lets you play an important role in our justice system but also teaches you a lot about yourself.

Comment what your experience was like if you've ever been on a jury! I'm intrigued!

[#juryduty](#) [#foreman](#) [#justice](#) [#jury](#) [#trial](#)

Have you ever been on a jury?

You can see how people vote. [Learn more](#)

Yes

No

Never Been Called

12 votes • Poll closed

👍 6

3 comments

👍 Like Comment Repost Send

Ashley Passow commented on this

[Profile] • 1st
Retirement Planner at [Profile]
3mo • Edited • 🔄
Ever play the card game Incoherent?

Try this one... ...more

👍 2

1 comment

👤 ▾ Like Comment Repost Send

Add a comment...



Ashley Passow • You
Digital Marketer 🌐 | Adventure Enthusiast 🌍 | Socials Connoisseur...
401k!

3mo ...

Like · 🔄 1 | Reply

You're struggling to reach diverse audiences on social media. How can you tailor your strategy effectively?

122 expert answers

Tailoring your social media for diverse audiences

Ashley Passow • You
Digital Marketer 🌐 | Adventure Enthusiast 🌍 | Socials Connoisseur 📱 | Do...

I think the first question is why would you be targeting a broad audience? Your marketing should be focused on a specific demographic based on who is buying your product/service. If ...more

👍 Like · 🔄 1

WHAT SHOULD YOU BE POSTING?

- **Content Ideas:**
 - Educational posts about retirement planning and financial wellness.
 - Client success stories (with permission).
 - Industry updates and how they affect clients.
 - Personal insights or lessons learned in your career.
- **Frequency:**
 - Aim for 3–4 posts per week.
 - Balance between promotional and value-driven content.



EDUCATIONAL

Examples:

- Retirement Planning Tips: "5 steps to maximize your retirement savings in 2024."
- Industry Insights: "What the latest market trends mean for your retirement plan."
- Financial Literacy Topics: "How to read and understand your 401(k) statements."



PERSONAL

Examples:

- Share your journey: "Why I became a retirement plan advisor."
- Highlight client success stories (with permission): "Helping this client reduce plan fees by 20% was incredibly rewarding!"
- Celebrate milestones: "Happy to mark 10 years in the industry!"



OPTIMIZE YOUR BRANDING



01 BE CONSISTENT



02 FIND YOUR VOICE



03 LEVERAGE
CLIENT SUCCESS



04 ENGAGE AND
BUILD
RELATIONSHIPS

R	P
A	G

HOW TO REPURPOSE CONTENT

USE EVERGREEN ARTICLES

- Articles or one-pagers that you are repurposing should not be dated
- Should have relevant information for today
- Can be easily digested

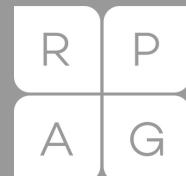
WHERE CAN YOU DISPERSE

- Ask ChatGPT to create 10 social posts from 1 article (can be long form or short form)
- Have it create emails for you as well to encourage meetings
- If it is an article, turn it into an easily read flyer using Canva



EXAMPLE OF REPURPOSING

1. Enter the prompt: I am a retirement advisor and I need to repurpose this article to increase my brand awareness to my prospects and clients. Create 3 short form social media posts, and 3 long form posts, and 2 drip emails that I can send.
[Copy and paste article]
2. Read and edit reply
3. Start scheduling out LinkedIn posts.



THE RETIREMENT TIMES

Protecting Benefit Plans from Cybersecurity Threats



Published by **RPAG** on Oct 13, 2024 2:44:00 PM

Many plan sponsors focus on external cybersecurity threats, such as hackers attempting to breach their systems. Disgruntled employees can also pose a risk.

Recently, the Department of Labor (DOL) extended the scope of its cybersecurity guidelines to include all ERISA Retirement Income Security Act (ERISA) plans, which include retirement, health, and welfare programs. The



Search



Home



My Network



Jobs



Messaging




Notifications



Me

For Business

Network Smarter, Try Premium Free



Ashley Passow

Start a post

Media Job Write article

LinkedIn News

Top stories

Major winter storm slams US
27m ago • 46,953 readers

Ashley Passow
Post to Anyone

Example of a social media post

Schedule for later

Post

Schedule for later

Post

Schedule post

Fri, Feb 14, 4:00 PM Pacific Standard Time, based on your location

Date: 2/14/2025

February 2025						
S	M	T	W	T	F	S
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	1
2	3	4	5	6	7	8

Go to today Cancel

Back Next

CONTACT US



949-305-3859



WWW.RPAG.COM



SUPPORT@RPAG.COM



R	P
A	G