Instagram Checklist for Financial Advisors

Keep this checklist handy to **optimize your Instagram presence** and engage effectively with your audience.

Getting Started

- ○ Use a professional headshot or your firm's logo as your profile picture.
- ○ Create an Instagram Business or Creator account. If you need to switch from a personal account, you can update it within Instagram's settings.
- ○ Connect your Instagram Creator or Business account with your Facebook Page. *(See page 4 for details.)*
- ○ Ensure your handle is professional and consistent with other social media platforms. Write a clear, concise bio (150 characters max) that includes:
  - Your name and title
  - Your firm's name
  - Your specialty or unique value proposition
  - A call-to-action (CTA)
- ○ Develop a branded hashtag for your firm.
- ○ Complete the "category" section to appear as "Financial Advisor" in searches.
- ○ Stay compliant. Review your firm's social media policy regularly and obtain the necessary approvals from your Compliance department before posting.
  - Include required disclosures in your bio and/or posts when discussing financial advice.
  - Avoid making specific investment recommendations or guarantees.
- ○ Add your Instagram to your email signature, blog, and newsletters.

Monthly Instagram ‘To-Dos’

- ○ Post at least 3 times a week. Mix your content topics and formats. Some ideas:
  - Use FMG's pre-approved, compliant content.
  - Create your own custom posts.
  - Share educational, personal, or promotional content. *Ex. 1 showing off expertise, 1 story showing your face, and 1 reel or carousel that is shareable.*
  - Share a variety of formats. *Ex. static posts, carousels, reels, and stories.*
- ○ Add relevant industry keywords for discoverability.
- ○ Plan your content calendar at least two weeks in advance.
- ○ Post during peak engagement times (typically 11 am-1 pm and 7 pm-9 pm). Use Instagram Insights to determine when YOUR audience is most active.
- ○ Ensure your design is eye-catching. Use high-quality, professional images, and maintain consistent branding (colors, fonts, and logo placement).
- ○ Leverage FMG Integration Features for direct posting and scheduling from the FMG dashboard to Instagram.
- ○ Download Instagram content in the Content Library and leverage the Canva integration to customize and share easily through your FMG admin.

Design Tips

- Use whitespace effectively
- Add your logo and brand colors to original content
- Use high-resolution photos (FMG’s social media tool integrates with
- Canva and Unsplash)

Monthly Instagram 'To-Dos' continued. . . .

- ○ Include hashtags (when appropriate).
  - Research and use 5-10 relevant hashtags per post.
  - Create a mix of popular and niche hashtags.
  - Include your brand tagline if you created one.
  - Update hashtags regularly based on trending topics.
  - Save groups of hashtags for different content categories.
- ○ Tag relevant accounts (when appropriate).
- ○ Respond to all comments as soon as possible (ideally within 24 hours).
- ○ Check engagement. Here are some things to look at:
  - See if your likes, comments, or shares are going up or down.
  - Identify your top posts to see what worked - and do more of that.
- ○ Refresh hashtags at least monthly. Swap in a few new ones based on your best performing posts.

Quick Content Creation Process

1. Log into your FMG dashboard
2. Select or create content using the Canva integration
3. Use AI to generate or personally refine captions
4. Add compliant hashtags
5. Schedule your post

Your Instagram account must be linked to a Facebook page for third-party integrations, like FMG. Please take the following steps to ensure you can share posts and content between your Instagram and Facebook Page. If you already have a Facebook page, skip step 1 below!

1

Create a Facebook Page (if you don't have one):

- Go to Facebook and log in to your personal Facebook account.
- On the left side of the screen, under "Explore," click on "Pages."
- Click "Create New Page".
- Fill in the required information about your business or brand (e.g., name, category).
- Follow the prompts to complete the setup.

2

Connect your Instagram account to the Facebook Page:

- Go to your **Instagram profile**.
- Tap "Edit Profile."
- Under "Public business information," select "Page."
- Tap "Continue" on the "Connect or create a Facebook Page" pop-up.
- If you already have a Facebook Page, log in to Facebook and choose the page you want to connect to.
- If you don't have a Facebook Page, create a new one.
- Tap "Connect" or "Create."

3

Share content across platforms:

- Once connected, you can share posts and stories from Instagram to your Facebook Page.
- When posting on Instagram, you'll have the option to also share it on Facebook.
- You can also manage your Instagram and Facebook inbox through the same inbox in Meta Business Suite or Messenger.

Need help using your marketing tools?

If you have questions for FMG Customer Support, call **858-251-2420**.