

10 MINUTE DAILY CHALLENGE

Follow this simple daily routine to leverage LinkedIn, the world's largest professional network, and help build your business, strengthen client relationships, and grow assets.

NEWS FEED | 1-2 MINUTES



Scan your LinkedIn newsfeed for posts by connections and influencers



Browse network updates for news, trends, and professional activities

LinkedIn helps focus your attention on the news and issues important to your contacts, keeping you in tune with their interests and needs.

MY NETWORK | 1 MINUTE



Accept (or ignore) requests to connect



Use LinkedIn's "People You May Know" feature to add new, quality contacts to your networks

Growing a quality network is crucial to using LinkedIn effectively. Leverage LinkedIn's algorithm to connect with new prospects and re-engage with existing contacts.

NOTIFICATIONS | 2-3 MINUTES



Monitor job changes, birthdays, and other life events



Follow up on career or life milestones in your network — online and offline



See who **viewed your profile**

Acknowledging important life events helps you stay top-of-mind and initiate conversations about rollovers, wealth management, and other topics.

MEETING PREPARATION | 4-6 MINUTES



Check your calendar for tomorrow's meetings with clients and prospects



Research your client or prospect's LinkedIn Profile to learn more about their professional lives. You may identify additional retirement assets from a previous job



Connect with them if you are not already connected on LinkedIn



Find common interests by scanning their personal and philanthropic activities, LinkedIn Groups, and LinkedIn Summary



Search your client or prospect's network to find your next best lead

LinkedIn users are proud of their professional accomplishments. Make use of profile information to inform conversations with prospects and clients — this can lead to stronger relationships.

PRO TIP

Always customize your request to connect.

Let prospects who you're about to meet know that connecting helps you work together more effectively. Don't hesitate to mention common interests in your requests.

"Looking forward to seeing you tomorrow. I see you're a member at Oakhurst. I'll be there for the charity tournament in June. Let's connect on LinkedIn. I find it helps me to be a more effective resource for you."

Partner with Putnam for social media training

Your Putnam consultant team is recognized industry-wide as a valuable partner in building your business using social media. They can work with you one-on-one in person, officewise, or via webinar to deliver custom training sessions to you and your clients.

FOR ADVISORS



Creating and optimizing your social media presence

Learn how to establish a social media profile that will build your brand to attract prospects. Topics include optimizing your LinkedIn profile to generate search results and privacy settings every advisor should consider.



Developing your LinkedIn network

A quality network is the core of your social media activity. We will share best practices for developing and growing your network and how to retain assets across multiple generations.

To learn more, contact your Putnam consultant, call us at 800-354-4000, or visit AdvisorsAREsocial.com



Prospecting and generating revenue using social media

This advanced session teaches how to use powerful search options to discover rollover opportunities with current clients, mine existing client connections for valuable referrals, leverage your alumni network, and identify your ideal prospect on LinkedIn. Leveraging wealth-management and money-in-motion opportunities via social media activity can lead to asset gains.

FOR YOUR CLIENTS



Growing your business with social media

Invite business owners and professionals to this seminar to learn how a robust social media presence can benefit any enterprise or individual.

Financial advisors: Consult with your firm's compliance department and be fully aware of its policies and procedures before you engage in any social media activities or alter your public profile.

This material is for informational purposes only and is not meant as an endorsement for any particular social networking site. Examples are for illustrative purposes only.

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Putnam Investments | 100 Federal Street | Boston, MA 02110 | putnam.com



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