



Why Every Financial Advisor Should Rewrite Their Bio

And How to Do It Right



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The Most Overlooked Page on Your Website

If you're a financial advisor, there's a good chance the most-visited page on your website isn't your homepage – it's **your bio**.

When a prospective client Googles your name, they rarely start by reading about your firm. They start by reading about *you*.

And that's where most advisors unintentionally lose them.

Too many bios sound like résumés – a long list of titles, degrees, and years in the business. Impressive? Maybe. But emotionally engaging? Not at all.

Your bio should do more than inform. **It should convert.** It should answer the question every prospect is silently asking:

“Can this person help me solve my biggest problems?”

Why the Traditional Bio Fails

A traditional advisor bio is focused on the *advisor's journey*:

“John has been helping clients for 20 years. He holds his CFP®, enjoys golf, and lives in Dallas with his wife and two kids.”

There's nothing wrong with that – but it's inward-focused. The reader doesn't see themselves in that story.

What's missing is the *client's journey*.

A modern, effective bio flips the focus from credentials to connection. It tells readers:

- Who you help
- The problems you solve
- The outcomes you create
- And what makes your approach different

Three Steps to Rewrite Your Bio the Right Way

1. Start with the Questions Your Clients Are Asking

Think about the conversations you have with your best clients. What's really on their minds?

For most successful families, it's questions like:

- “Am I doing everything I should be doing?”
- “How do I make sure all my advisors are on the same page?”
- “What's the plan for my family when I'm no longer running things?”

Lead with those questions. They create instant relevance and make the reader feel understood.

2. Introduce Your Process – Not Just Your Position

Instead of describing what you do, describe how you do it.

“Through our Seven Pillars Process, we help clients simplify their financial lives, align their wealth with their values, and create lasting impact for their families.”

This moves your value proposition from transactional (“we manage portfolios”) to transformational (“we help you live intentionally”).

If you're using a proven process – like those developed by Pareto Systems – this is where you highlight it. Processes build trust and convey professionalism.



3. Bring It Back to You – But Briefly

Once you've framed your value and your process, then you earn the right to talk about yourself.

Share your credentials *in the context of your purpose*:

“After 20 years in wealth management, I've learned that success isn't just about numbers – it's about alignment. That's why I've built my practice around helping clients turn success into significance.”

And then finish with a **humanizing touch** – a personal note that reinforces your authenticity: family, community involvement, or a passion project.

The Payoff

When you shift your bio from informational to intentional, it becomes one of your most powerful marketing tools.

Instead of a static page about you, it becomes a conversation starter with your ideal clients.

And when someone searches your name – as they inevitably will – what they'll find isn't just a résumé.

They'll find a value proposition.

If you're serious about positioning yourself more effectively online, use my attached worksheet: **“How to Turn Your Bio Into a Value Proposition.”**

It walks you through the exact prompts and structure I use with top advisors to rewrite bios that convert.



Worksheet

How to Turn Your Bio Into a Value Proposition

Purpose: Most advisor bios sound like résumés. This worksheet helps you turn yours into a client-focused value proposition – one that converts readers into conversations.

STEP 1:

Start with the Client's Questions

Your bio shouldn't begin with *you*. It should begin with them – the questions your ideal clients are already asking themselves.

Prompt:

What are the top 2–3 questions that your best clients ask when they first meet you?

Examples:

- *Am I doing everything I should be doing?*
- *How can I make sure everything works together?*
- *What's the plan for my family or business when I'm no longer running things?*

Your answers:

1. _____

2. _____

3. _____





STEP 2:

Define Who You Help

Be specific. The more clearly you define your audience, the more they'll see themselves in your message.

Prompt:

Who are you best equipped to serve? What stage of life or business are they in?

Example:

“I work with successful families, business owners, and professionals with \$1M+ in investable assets who want to simplify complexity and gain clarity.”

Your Version:

STEP 3:

Describe the Problems You Solve

What issues keep your ideal clients up at night? What challenges do you consistently help them overcome?

Examples:

- Coordinating between multiple advisors
- Reducing taxes and inefficiencies
- Creating multi-generational continuity
- Aligning wealth with personal values

Your Top Problems Solved:

1. _____

2. _____

3. _____



STEP 4:

Explain Your Process (Your “How”)

Clients trust process over promises. This is where you introduce your proprietary or adopted framework (such as the **Pareto Systems Seven Pillars**).

Prompt:

How do you help clients create clarity, alignment, and confidence?
What process, philosophy, or methodology do you use?

Example:

“Through our Seven Pillars Process, we ensure that every part of a client’s financial life is connected and coordinated – from investments to estate planning.”

Your Version:



STEP 5:

Express Your Purpose

Now it's time to bring *you* into the story – but with intention.

Prompt:

Why do you do this work? What's the personal insight or belief that drives you?

Examples:

- “I believe wealth should serve a purpose beyond money.”
- “I’ve built my practice around helping clients turn success into significance.”

Your Version:

STEP 6:

Add a Humanizing Touch

A brief personal note at the end makes you approachable and real.

Examples:

- “Outside of work, you’ll find me playing guitar, traveling with family, or mentoring young advisors.”
- “My greatest fulfillment comes from seeing clients gain peace of mind and purpose.”

Your Version:



STEP 7:

Pull It All Together

Use this fill-in framework to assemble your new bio draft:

“After [number] years helping [target clients] navigate [main challenges], I’ve learned that [core belief].

Through our [process name], we help clients [key outcomes].

The result is a plan that’s [three adjectives: e.g., integrated, intentional, and enduring].

[Optional closing sentence about purpose or personal touch.]”

YOUR FINAL DRAFT:

Next Steps:

- ✓ Review your new draft aloud – does it sound conversational, confident, and client-focused?
- ✓ Post it on your website and LinkedIn.
- ✓ Add a short video version of you reading it – prospects engage 2–3x longer with video bios.



SCOTT HAMILTON

**MASTERMIND LEADER, BUSINESS
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Scott is a seasoned professional consultant and business advisor, with extensive experience helping advisors grow and scale their advisory businesses.

Over the years he has worked as an attorney and consultant in the areas of divorce, high net worth, business exit, and tax, bringing that wealth of experience to his coaching and mastermind groups. His clients range from solo advisors to multi-advisor teams, including a number of multi-billion-dollar teams.

Scott has been a certified Pareto Systems coach for 8+ years and leads mastermind groups for Pareto Systems in the areas of divorce, M&A, exit planning, the "Road to a Billion," and others. Scott is married to Kim Hamilton (30+ years) with a large contingent of children and grandchildren. In addition to many family activities, Scott spends much of his free time playing guitar and songwriting.



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