

# Follow their lead – Top advisers and their Twitter profiles

10 March 2016



What does it take to make an impact with just 140 characters? We showcase 10 financial advisers with successful Twitter accounts and get their advice on how to use Twitter to make an impact.

If you're going to invest time establishing a Twitter profile, you want it to deliver business benefits or establish you as a thought leader among your peers. We asked 10 financial advisers with successful Twitter accounts what works and how they use their tweets to help them to stand out from the crowd. Here's what they had to say:

## 1. Charles Badenach, principal and private client adviser, Main Street Financial Solutions.

@CBadenach  
Followers 5068

Example of recent tweets:



**Charles Badenach**  
@CBadenach



 Follow

5 frugal habits of the world's [#richestpeople](#) —  
via [@Entrepreneur](#) [read.bi/1R3mA3V](#) via  
[bi\\_contributors](#)



**Charles Badenach**  
@CBadenach



Follow

[#bucket list - Top five regrets of the #dying](#)  
[gu.com/p/356tg/stw](http://gu.com/p/356tg/stw) [#inspiring](#)

**What works?** “Being consistent with your message, using hashtags and engaging in forums when opportunities arise, such as conferences or roadshows. Following global thought leaders has enabled me to work locally, but engage globally which is very powerful. I have found automated direct messaging and tweets to a new follower haven’t worked, as it’s too impersonal. It still needs to be personal. Twitter is a waterfall of information and to be noticed in that flow you need to find your niche. You can’t be all things to all people.”

**What and when?** “I’ve always had an interest in all things financial, technology, innovation and motivation, so that is what I tend to focus on. I believe a combination of professional, personal and even humorous tweets can work as long as you are consistent with your personal brand and what you’d like that to represent. I usually tweet two to three times per day. It’s just a habit that I do first thing in the morning. I have also adjusted the settings so that whenever I am mentioned on Twitter, I receive an email which enables me to respond immediately. If I am at a conference or at an inspiring event, I will tweet throughout that event.”

**2. Amanda Cassar, advisor director, Wealth Planning Partners.**  
@FinanceChicks  
Followers 3394

**Example of recent tweets:**



**Amanda Cassar**  
@FinanceChicks



Follow

The only people who never fail, are tho who never try!



**Amanda Cassar**  
@FinanceChicks



Follow

With markets down 14% globally from peaks, diversified & patient investors will be rewarded  
[@vanguard\\_au](#) Jeffrey Johnson [#Smsfassoc](#)

**What works?** “Remembering that social media is all about being social. It’s not a hard sales tool, advice platform or the opportunity to flog products. Share interesting content that’ll position you as a thought leader or influencer in your chosen area.”

**What and when?** “Usually, I'll try to tweet daily. On my business account @wealthpp, I tweet up-to-date economic information, what's going on in the world of finance and what's happening in my business. I update weekdays. On my personal profile, @financechicks, I share my travels, learnings, conference highlights, fun take-outs and support others with retweets and likes. Most people want to find the face behind the corporate. More engagements occur with personal updates, insights into what's going on in the firm and putting some personality into the account.”

### 3. Sarah Riegelhuth, co-founder of Wealth Enhancers.

@SarahRiegelhuth  
Followers 3043

Example of recent tweets:



**Sarah Riegelhuth**  
@SarahRiegelhuth



Follow

LOVE reading #membermondays from @TheLeagueWomen and this one is no exception. @naturalsupplyco has a fab story. xx [bit.ly/1nlf4CW](http://bit.ly/1nlf4CW)



**Sarah Riegelhuth**  
@SarahRiegelhuth



Follow

Great job on #celebrityapprentice tonight #WEmember @jamesmathison! Seems @WealthEnhancers taught you a thing or 2 about personal finances!

**What works?** “Being myself and interacting with others. Engaging in conversations, especially around a theme or at an event. Consistency is key. So too is working out which social media platform is right for you and your audience. Don't try to do all of them. Just choose the ones that make sense for you and focus your efforts there. It's also important to engage with others more than just pushing content out.”

**What and when?** “These days I mainly tweet when I'm at an event or conference. Other than that, I check in regularly and chat with people. My business @wealthenhancers tweets more regularly and we post inspirational quotes, finance tips, share articles, promote things we are doing and generally engage with our community. Definitely show your personal side, and if humour is part of that then go for it. Just be authentic. I do think it's good to stick to a consistent set of topics though, so that people who follow you know what to expect.”

### 4. Jenny Brown, founder and CEO of JBS Financial Strategies.

@JBSFinancialJB  
Followers 2429

Example of recent tweets:



**Jenny Brown**  
@JBSFinancialJB



Following

Great opportunity to help with cashflow.  
Looking forward to seeing everyone in  
#Canberra #AFAau



**Jenny Brown**  
@JBSFinancialJB



Following

Time is a rubbish excuse for not embracing  
#SocialMedia if u spend time watching TV u  
have time for marketing 😊 @Franklin\_Adam  
#AIBootCamp

**What works?** “Sharing both our own content as well as that of others, making comments and retweeting. I try to be a thought leader and to be known for working with women in business and financial services through the Association of Financial Advisers (AFA). I also try to inspire others and be known within financial services for giving back.”

**What and when?** “I tweet interesting tips, news from conferences, pictures of slides and I look at creating a community. I also share information and ‘conversations’, particularly around how to run a successful business. I will tweet anything that is relevant to me and my business and that I feel will be relevant to others running a small business or giving financial advice. Work on what is relevant to you. Twitter is a cocktail party, so it’s fine to share the personal side.”

**5. Michal Bodi, senior financial planner and financial coach, Sydney Financial Planning.**

@MichalBodi

Followers 2359

Example of recent tweets:



**Michal Bodi**  
@MichalBodi



Following

Money is a servant, not a master. How do you  
manage it? #moneybehaviour



**Michal Bodi**

@MichalBodi



Following

Have you ever stopped and had a good think about what matters to you (without looking at what everyone else's doing? [lnkd.in/bc\\_rCmd](https://lnkd.in/bc_rCmd)

**What works?** "Genuine conversations. Having said that, I started by sending out messages that were screaming out, making people think and disturbing the status quo. That generated a following and consequently conversations which developed into relationships and friendships. The 140 character limit is a great way to re-think how to articulate complex issues and express them in a simple way, so it helps me a lot with my writing."

**What and when?** " I include a mix of my personal and professional views in a single tweet. I try to challenge my followers' thinking and help out using my professional expertise. I also use Twitter as a way of keeping in touch with many people. It's more practical than sending an email. How often should you post? That varies. There could be days without me sending a single tweet and other days where I will tweet all day. I stopped scheduling my tweets a long time ago. Even though Twitter is live and fast, there is no need to respond to conversations immediately as it will mess up your day. I recommend turning the notifications on your phone off. They will make a slave of you! You could stick to dry financial services news, but that would largely be a waste of time as it's often just a repetition of what people already read in their emails and news. You have to show who you are as a human being, your humour, your quirkiness. There are an estimated 500 million tweets sent out per day. Unless you get people's attention, you will be invisible and will end up tweeting amongst each other in the office."

**6. Marshall Brentnall, financial adviser at Evaluesco Financial Services.**

@MarshBrentnall

Followers 1933

**Example of recent tweets:**



**Marshall Brentnall**

@MarshBrentnall



Following

@rjmontgomery great article in the @australian today on the 8 habits of highly effective investors. Thanks for sharing.



**Marshall Brentnall** @MarshBrentnall · Feb 19

One of my clients just bought their dream "cottage by the sea". So happy for her. #wellheeledwomen

**What works?** "Twitter allows you to reach out and engage with anyone in the community. I have used many approaches and scores of different tactics, but by far my most valuable learnings have come from John Sparks @iamjohnsparks and his book, To Go From Good To Great On TWITTER! In short, authenticity, asking open-ended questions and retweeting people's content and ideas are what works. Private profiles, too much scheduling and auto-responders can come across as impersonal and, in my view,

erode goodwill and trust. If you like something, retweet it. Don't just hit 'like'. The like button is designed to allow you to capture that tweet so you can come back to it. If someone follows you, follow them back."

**What and when?** "I am a regular tweeter on topics such as rugby, technology, financial advice, politics and anything that interests me and will send anywhere from two to 10 tweets a day."

**7. Dominique Bergel-Grant, director and principal financial adviser, Leapfrog Financial.**

@LeapfrogFin  
Followers 1442

**Example of recent tweets:**



**DominiqueBergelGrant**  
@LeapfrogFin



Follow

Building Your Financial Future Workshop This Saturday... Don't miss out. - [eepurl.com/bymgMD](http://eepurl.com/bymgMD)



**DominiqueBergelGrant**  
@LeapfrogFin



Follow

Start to follow me [@LeapfrogLIFE](#) an exciting new way of showing Australians how to live an extraordinary LIFE.

**What works?** "Twitter has allowed me to support my other social media actions. It provides an ability to start a conversation and is a key tool in helping to build a community around my business. Don't hide behind a brand. Instead, show vulnerability and authenticity."

**What and when?** "It varies significantly. It has very little to do with money. It is more about sharing my personality and personal experiences. I try to ensure I regularly tweet at least to show who you are as a human being, your humour, your quirkiness. There are an estimated 500 million tweets sent out per day. Unless you get people's attention, you will be invisible and will end up tweeting amongst each other in the office."

**8. Tim Mackay, principal, Quantum Financial.**

@timqfadvice  
Followers 1261

**Example of recent tweets:**



**Tim Mackay**  
@timqfadvice



Following

W/ listed products now avail., why let your tied  
#SMSF advisor force you to invest via their  
parent's platform?



**Tim Mackay**  
@timqfadvice



Following

Rec'd unsolicited email from BDM flogging  
"Supervised High Yield Fund"  
What if I want to invest in the 'Unsupervised'  
option?  
#SMSF

**What works?** "I'd recommend picking a specialised topic that you're interested in and focusing on that to start with. Find out by searching who else tweets on your topic and learn from what they do. Twitter is not a magical untapped source of new clients who will suddenly beat down a path to your door. When you first sign up for Twitter, it can actually be quite a lonely experience and not a 'social' experience at all. You'll have few followers and you won't ever be sure if anyone is actually reading what you tweet. If you tweet interesting things and interact with other Twitter users, you should start to gain followers."

**What and when?** "I typically tweet articles and thoughts related to finance and in particular SMSFs and financial planning. However, I also tweet on issues I find personally interesting such as sport, history and politics. I don't have a formal timetable for when I tweet, just whenever I come across something of interest to me. What you tweet should depend on your personality. If you're naturally an introvert, you'll never feel comfortable trying to pretend to be someone else on any social media platform."

**9. David Reed, retirement specialist, The Retirement Advice Centre.**

@smartretirement  
Followers 1626

**Example of recent tweets:**



**David Reed**  
@smartretirement



Follow

What markets do today or tomorrow has little  
bearing on outcomes for people with a  
decades-long horizon. [bit.ly/1PKz7GM](https://bit.ly/1PKz7GM)



**David Reed**  
@smartretirement



Follow

Drink less to save more.

3 less glasses of wine per week, may provide an extra \$144,100 in retirement (ASFA).

[buff.ly/21PWAZF](http://buff.ly/21PWAZF)

**What works?** “A worthwhile analogy is to think of Twitter as a social party. If you’re just standing on a stool, shouting out random things, then it’s not the most effective way to start a conversation. Talk to those people talking about things of interest and engage with like-minded people.”

**What and when?** “My general rule is that if it’s of interest to me, then I will tweet it to followers. Subjects that are of interest can range from lifestyle items, financial topics, gerontology subjects, to developing a purpose in retirement. As I prefer a quality over quantity approach, I would tweet four to five times per week on average.”

**10. James Sutherland, founder of myonlineadvisers and financial coach.**

Followers 1580

**Example of recent tweets:**



**James Sutherland** @Jamess\_Twits · Feb 11  
#knowit “@Naomi\_Midwinter: Fail hard and often - wise words from @SocialAdviser at #adviseredge @AdviserEdge ”



**James Sutherland**  
@Jamess\_Twits



Follow

Woohoo Friday afternoon special time.

@OfficialAdele has just put up a song off her new album. It's a cracker :)

[youtube.com/watch?v=DDWKuo...](http://youtube.com/watch?v=DDWKuo...)

**What works?** “I try to tweet things that I think are out of the ordinary and let my personality shine through.”

**What and when?** “The frequency of my tweets depends on what’s happening. My tweets can be relevant to financial planning or personal, and they can be humorous. They often involve issues faced by advisers and legislative changes. I also retweet a lot of AFA stuff.”

## **The top Twitter advice from advisers**

- It's best to share – reciprocity works really well.
- Thank people when they share your information.
- Create a brand and build it. Be consistent.
- Follow thought leaders to gain great information and new ideas that you can share with others.
- People buy people and this is a relationship industry. Show who you are and be authentic.
- Don't try to be funny if you are not funny. It will become very clear to people very quickly if you are real or not when they meet you.
- Social media is an online representation of you and that's what should be visible to those who read and engage with you.
- From your tweets, people will try to determine what sort of person you are, not whether you can produce the best technical financial advice.
- Followers will see from your profile that you are a financial adviser so don't repeat the obvious.
- Always be mindful of what you are posting and how it can be perceived (both positively and negatively).
- Be prepared for a few trolls to raise their heads now and then.
- Maintain professionalism.