Agent Social Media Profile Optimization Checklist

Make sure your social profile builds trust, not doubt.

Make a strong first impression online—before you even say a word.

---

1. 📸 Profile Photo

☐ Clear headshot—professional or clean casual
☐ Well-lit, smiling, and recent (not a logo or avatar)
☐ Cropped tight enough to see your face clearly

Your face builds trust. People buy from people—not logos.

---

2. 📝 Headline / Bio

☐ States what you help people with, not just your job title
☐ Avoids vague phrases like "Entrepreneur" or "Helping families…"
☐ Includes keywords: "Life Insurance," "Mortgage Protection," "Final Expense," etc.

Instead of "Licensed Agent," try: "Helping families protect their income and legacy."

---

3. 📍 Location / Service Area

☐ Lists the states you're licensed in
☐ Mentions if you offer remote consultations (e.g., "Licensed in MI, FL, TX – Helping families remotely or in person.")

---

4. 📞 Contact Info

☐ Cell phone listed or available via DM
☐ Email or calendar link available in About/Bio section
☐ Optional: Linktree, landing page, or quote form in bio

---

5. ✅ Call-to-Action

☐ Invite people to message or book a time
☐ Avoid overly "salesy" language—keep it helpful
☐ Example: "Curious what life insurance costs? Message me—I'll send a quote, no pressure."

---

6. 📉 Things to Avoid

☐ No rants, complaints, or vague passive-aggressive posts
☐ No excessive reposts or MLM-looking content
☐ Keep personal + business posts balanced, real, and human

7. 🧱 Cover Photo or Banner (Facebook/LinkedIn specific)

☐ Professional, branded, or neutral background image
☐ Includes your value statement or a call to action (optional)
☐ Avoids clutter, random quotes, or irrelevant photos

Think of it as a digital billboard—it should reinforce who you are and how you help.

---

8. 💮 Pinned Post (Facebook or LinkedIn)

☐ Brief intro post pinned to top of your profile
☐ Includes who you help, how you do it, and how to reach you
☐ Optional: include a testimonial, photo, or personal story

Your pinned post is your elevator pitch. New visitors should know what you do within 10 seconds.

Page 2 of 2