

# OWN YOUR LANE

for Finance Professionals

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A decision-tree framework for experienced finance professionals  
who are ready to build a professional presence online

Designed by a Finance & Marketing  
professional  
who understands both worlds

**IDENTIFY**

Your Niche

**CHOOSE**

Your Platform

**WRITE**

Your Positioning Statement

## THIS BLUEPRINT IS FOR YOU IF:

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- You have years of finance expertise but no real online presence
- You're already creating content but not seeing results
- You want a logical, structured approach, not generic branding advice

**Work through the decision tree. Walk away with your positioning.**

Free resource — share with a colleague in finance

# How to Use This Blueprint

This blueprint is built around a single branching question that routes you to the right path based on where you are right now. Work through it step by step. Both paths end with the same output: a positioning statement that is yours.

## Segment 1

### The Expert Who Has Not Started





- Deep expertise, no online presence • Unsure where or how to begin
- Needs: a starting framework

## Segment 2

### The Creator Who Is Not Seeing Results

- Already posting, no traction
- Unclear niche or wrong platform • Needs: a diagnostic reset

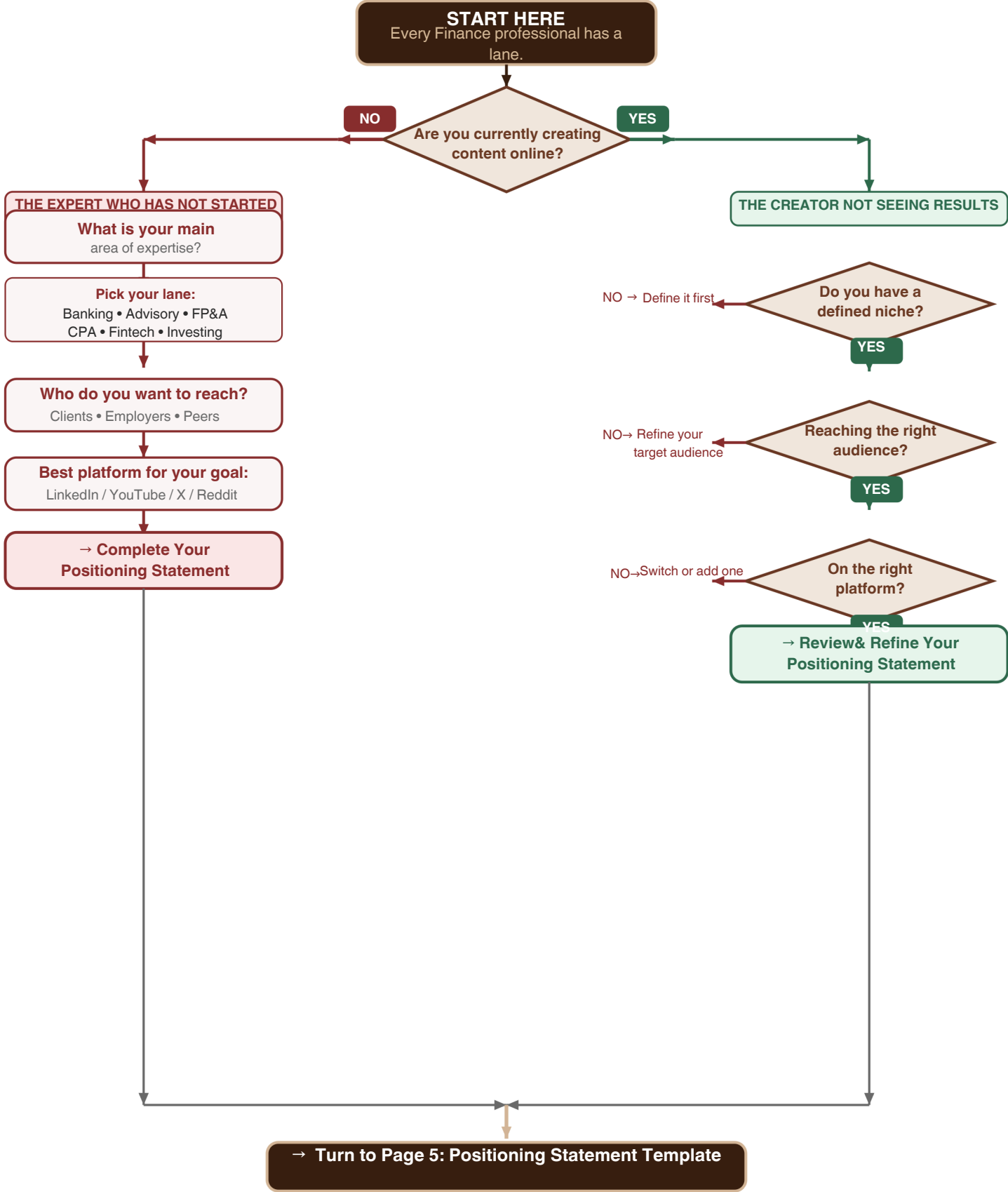
## Visual Legend

-  Diamond shape — a decision point. Answer to choose your path.
-  Rounded box — an action step or reflection prompt.
-  Green arrow / label — the YES route.
-  Red arrow / label — the NO route.

### By the end of this blueprint, you will have:

- ◆ Your defined niche
- ◆ Your completed positioning statement
- ◆ Your recommended platform(s)

# The Own Your Lane Decision Tree



# Platform Quick-Reference Guide

Platform	Best Audience	Content Format	Best For	Finance Fit
<b>LinkedIn</b>	Professionals, recruiters, clients, executives	Articles, posts, carousels, newsletters	Credibility, B2B, career growth	★★★★★
<b>YouTube</b>	Broad public, investors, learners	Long-form video, shorts, tutorials	Deep expertise, evergreen SEO content	★★★★■
<b>X (Twitter)</b>	Finance Twitter, journalists, peers	Threads, quick takes, commentary	Real-time market commentary, thought leadership	★★★★■
<b>TikTok</b>	Gen Z, young professionals, FinTok community	Short video 15–60 sec, trending audio	Reaching younger finance audience early	★★★ ■■
<b>Instagram</b>	Lifestyle-adjacent, younger professionals	Reels, carousels, stories	Brand aesthetics, financial education reels	★★★ ■■
<b>Reddit</b>	r/personalfinance, r/financialcareers, r/investing	Long-form text, Q&A; AMAs	Community trust, organic niche authority	★★★★■

**Pro tip:** Start with ONE platform. Master your positioning there before expanding. LinkedIn is the highest-signal starting point for most finance professionals.

# Your Positioning Statement Template

## THE FORMULA

I help [WHO] navigate [CHALLENGE] so they can [OUTCOME] through [YOUR APPROACH].

Everything you post should connect back to this statement.

### WHO are you helping?

e.g., early-career analysts, independent advisors, CFOs at mid-market companies

### WHAT CHALLENGE do they face?

e.g., building credibility online, navigating regulations, managing career transitions

### WHAT OUTCOME do you help them achieve?

e.g., land better clients, grow their reputation, make confident financial decisions

### WHAT IS YOUR UNIQUE APPROACH?

e.g., through 15 years in FP&A, through behavioral finance, through plain-language breakdowns

### Example (fill yours in above):

"I help early-career analysts in investment banking build a credible LinkedIn presence so they can accelerate their path to VP — through content that reflects real work, not a highlight reel."

**Bookmark this page.** Return to it as your strategy evolves. Your positioning will sharpen over time.

# What's Next?

You have your lane. Now show up in it.

01

## Post your positioning statement on LinkedIn

Copy your completed statement from page 5. Post it as a LinkedIn update. No hashtags needed. Just put it out there.

02

## Create one piece of content this week

It does not have to be perfect. It has to be yours. Write one post, record one short video, or answer one question in your niche. Start the habit.

03

## Share this blueprint with a colleague

Forward this PDF to one finance professional sitting on their expertise. The best referral you can give is a tool that actually helps.

04

## Follow for what comes next

This blueprint is part one. Connect on LinkedIn for ongoing insights on building a finance brand that opens real doors.

Share your positioning statement with me on LinkedIn.

[LinkedIn](#)

Forward this to a colleague who needs to own their lane.