

How to Write a Professional Bio for your BlueStar

Why?

Here's your opportunity to describe your business and the value you bring to your clients. Below are some guidelines, but it's important to tell your own story and be authentic. The bio can then be used on your website's About Page as well as LinkedIn profile or any other platform which requires you to share a little about your business and what you do e.g. business directories, webinar and presentation introductions etc.

Requirements

Work with your consultant to construct your bio and to bounce ideas off each other.

- Minimum 500 characters, to a maximum 1000 characters (*check using Word character count*)
- Please use full sentences and paragraphs, not bullet points
- Maintain a professional tone – even if your story has a personal aspect
- Don't mention specifics such as years, names of people, number of staff - instead use generic terms such as the year, staff roles, ranges etc.
- You may use parts of your CVP to construct your bio (remember to stay within the character limit)

Use the following structure to write your bio

The left column describes the sections to cover, write your sentences and combined you will have a bio.

<u>Introduction – start with...</u> • Business name, Location you are based in; • Write a single thought about why clients should work with your business, what makes your BlueStar different/ your unique value proposition; • Key services offered and the type of clients you work with or niche audiences you want to help;	<i>Prudentis BlueStar located at Lion Match Business Office Park, 1st Floor Stadium Building, 892 uMngeni Rd, Morningside 4025.</i> At Prudentis BlueStar, we provide sophisticated financial guidance and wealth management solutions to discerning individuals, professionals, and business owners. Our team of experienced experts delivers personalized service, leveraging extensive knowledge and expertise to help our clients achieve their financial aspirations. With a deep understanding of the complexities and nuances of wealth management, we craft tailored strategies that address the unique needs and goals of our clients. Our commitment to excellence, integrity, and personalized attention has earned us the trust of our esteemed clientele. Let us help you navigate the complexities of wealth management and achieve financial prosperity. Our target market ranges from personalized service, and sophisticated solutions that would appeal to a
--	--



	professional and affluent audience as well business owners.
<u>Next – share some background to the business...</u> • Mention when the business started, specialities and relevant industry awards or accomplishments; • Talk about how and why you started; the meaning behind your BlueStar name, learnings as a financial advisory practice; causes you support; Be authentic; • Mission statement and values, motto, hashtag or quote you live and work by;	Prudentis Wealth (PTY) LTD founded in 2018 T/A Prudentis BlueStar affiliated with Sanlam. Prudentis Wealth, was honored with a prestigious Quality Award in 2019 during our tenure at Succession. Our name, derived from the Latin word 'Prudentis,' embodies our mission to empower clients with wisdom and guidance on their path to financial freedom. With a commitment to excellence and a passion for delivering expert advice, we help individuals, professionals, and business owners achieve their financial aspirations. Our team of seasoned professionals takes a personalized approach, providing bespoke solutions tailored to each client's unique needs and goals. At Prudentis BlueStar, we believe that financial wisdom is the key to unlocking a brighter financial future, and we're dedicated to helping our clients achieve just that. Our Motto “Prudent Guidance for a Secure Tomorrow”
Mention your team - what they offer clients, what makes them great.	Our team of experienced experts in the field delivers personalized service, leveraging extensive knowledge and expertise to help our clients achieve their financial aspirations. With a deep understanding of the complexities and nuances of wealth management, we craft tailored strategies that address the unique needs and goals of our clients. Our commitment to excellence, integrity, and personalized attention has earned us the trust of our esteemed clientele. Together we can help you navigate the complexities of wealth management and achieve financial prosperity.
Close with an invitation/ call to action	<i>Schedule a consultation today and lets start building a brighter financial future together.</i>

Once completed, sections should be combined, edited and captured on your profile in Practice Data on SanPort.

