

[How a former Marine built a veteran niche on LinkedIn](#)

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Body

One of the most important things a financial advisor can do when building a niche is speak the same language as their clients and prospects - it's mission critical.

That language is quite specific for Andy Leung, whose six years in the Marine Corps and graduation from the U.S. [Naval Academy](#) have been a huge part of his ability to connect with veterans, who make up about 80% of his niche as vice president and a private wealth advisor at Procyon, an RIA based in Shelton, Connecticut that is part of Dynasty Financial Partners.

"I understand a lot of their background, and I understand a lot of the benefits, the military benefits, that are in front of them or available to them, and then how to translate that into a financial plan, retirement planning, etc.," Leung said.

"People's brains work differently, and the people that I work with are very intelligent people, and they're capable, but they can be focused on other things aside from their finances."

How advisor can help clients face rising costs and stress for military family caregivers

Talking to veterans is the easy part for Leung. Getting in front of target prospects, as most advisors know, is more difficult. He utilizes a LinkedIn strategy popular in the Dynasty network that targets niche clients with specific frequency and messaging.

So far, objective secured.

Below, Leung walks through the LinkedIn strategy, how he built his niche and advice for those looking to do the same.

This conversation has been lightly edited for length and clarity.

Financial Planning: How did you get the first clients in your niche?

Andy Leung: I went to the obvious classmates, people that I served with previously, and it was a group that really needed help.

FP: Where did you go after that?

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AL: From a marketing perspective, what has been very successful for me is social media. I'm pretty clear on my intentions when I reach out on social media - what I'm offering and what relationship I'm trying to develop. Military people appreciate that. We're not long-winded, and we like to get to the point. If I can help you, that's great. And if not, then we could still swap some sea stories.

With the military connection, that's a pretty warm lead. They see that this person is serious-minded, this person is most likely a person that I can trust, and so people are willing to make that connection. I've spoken with other people who use social media for business development, and whether it's college alumni or whether it's other colleges or groups, it's really a cold call. Whereas I think [with] the military, your first call with them is a pretty warm call.

Building an RIA marketing funnel? Here's how to do it right

FP: Tell me a little more about your social media strategy. How are you targeting those prospects?

AL: Primarily, it's LinkedIn. The AI search goes by veterans, *Naval Academy*, Marines, etc., somewhere in their profiles. It focuses on second connections, so there is some kind of connectivity with that person, and then it just sends out a series of messages to connect with them. Once they accept the connection, then it's up to me to start a dialogue. But it sends out four messages to them, and then it stops nagging them.

FP: If you haven't gotten them on the fourth knock, they're not coming to the door. Is that it?

AL: Yeah. But it is surprising. We had tried five, and then we decided to optimize this at four messages. The number of people I have gotten on my concluding message - "This is the last time I'm going to reach out to you. I understand that you may already be well taken care of. If you ever want to reach out - do so." I've done the analytics on which message they respond to, and a surprisingly high number of meetings come from the fourth outreach.

FP: How many people do you tend to reach out to? And what's the win rate look like?

AL: Here's an example. I went on a two-week vacation over Christmas, and when I came back, I had 45 people that had gotten back to me.

After tragedy, a planner finds a niche advising women in grief

FP: What kind of planning challenges do your niche clients have that stand out from others?

AL: For military people or for veterans, I put clients in two kinds of two buckets. Bucket one is people that did their initial service, have exited the military, and now they're five to 10 years into their career and they're just starting to make money there. So their financial picture is getting a little bit more complex. In the military, you're on a pretty tight, shoestring budget. So now, if they're five to 10 years in, they're starting to get more complex compensation, deferred compensation, potential equity in companies, RSUs, ISOs and they need help.

The other side is military retirees. They exit the military after 20 to 25 years and they have their pension, their VA disability, health care for life, and then they're entering into act two. I kind of act as the Rosetta stone, because they understand the lingo of the military, they understand the acronyms. They've been very successful in that. And now they enter into the private sector and they are joining firms at a pretty senior level with very good compensation. They really need the retraining for the private sector. They need help translating what these things mean to them.

FP: What's your best advice for someone who wants to start a niche practice? What will make them successful?

AL: The first thing you can do is identify the pain points of that niche. What are the real hard decisions that they have to make, and then you become an expert on it.

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I have a pitch deck, and I identify the common problems that this group of people has, and then I have a solution for them. For those individuals, it can be a teeny little thing that they just get caught up on. And you say, OK, I have an easy solution for them. And they're like, "wow!" That really resonates with them.

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