



The Financial Advisor's Guide to Creating an Engaging Website



Your website is your most powerful prospecting tool.

The Web is our go-to resource for learning more about any person, place, or product. In today's digital world, we regularly form new connections online, but we want a clear understanding of the person or business before we engage. Ninety percent of searchers haven't made up their mind about a brand before starting their search.¹ Which is why financial advisors need to be thoughtful when establishing a digital presence. They must help their online audience understand who they are, the value they bring, and how to reach them. With a modern website, financial advisors have an opportunity to make a profound first impression that engages prospects and deepens long-term relationships.

It's also more than likely that any tactics you've established as part of your marketing plan include or link back to your website—so you'll want to be sure it's polished and best positions both you and your business before launching those initiatives.

In this guide, we share 10 steps for creating an engaging website that will anchor your digital marketing strategy and incorporate content from your Advisor Branded Marketing (ABM) subscription.

1. <https://www.hubspot.com/marketing-statistics>

Step 1: Get Inspired

Before creating your website, take some time to review other websites to use as inspiration for your own. It's important to know what you like and don't like. Think about some of your favorite brands and check out their sites. When first arriving on a homepage, take note of the following:

Design

Does the site feel modern? As you look at the imagery and overall design, you should get a sense of how often the website is maintained. Does it look like it's updated on a regular basis or does it feel like it's stuck in the past?

Copy

Can you easily identify what the company offers, who they serve, and how it might be different from others in the space? Copy should speak to the viewer and be relatable.

Organization

Is there a natural flow that makes the site intuitive to navigate? Browsing the website should feel effortless.

Interactive Elements

Did any elements or features grab your attention?

Step 2: Choose Your Domain Name Wisely

The domain name is the URL that website users type into the search bar to view your website. Your URL should be short, easy to remember, and describe your business. This helps visitors understand where they are headed and allows them to easily return to your website in the future.



WWW

Step 3: Select a Website Service

Leave the development of your website to a trusted service so you can focus on your clients. Besides, building a website on your own can seem like a daunting task. There are plenty of reasonably priced website services for advisors. That's why it's wise to consider finding a website service partner that can help simplify the process.

Step 4: Outline Your Website's Structure

The structure of the navigation bar and the hierarchy of the web pages that make up your site are very important to make your website user friendly. The organization of pages can also help increase SEO (Search Engine Optimization) rankings. We'll cover SEO in more depth later. Remember those websites you liked. How was their website structured?

Tips

The navigation bar should:

- Be very easy to find
- Be in the same location and displayed the same way on every page of your website
- Include no more than five to six sections (i.e. – services, about us, team, etc.)
- Highlight your visitor's current website page

For the footer:

- Keep it simple
- Make sure you've linked to all website pages, contact information, social media channels, a call-to-action, FINRA, and any pertinent compliance requirements
- Be sure to include a copyright notice

List the top areas that you think will be most relevant to your viewers.
Do they match the current pages on your website?

- 1.
- 2.
- 3.
- 4.
- 5.

Not sure where to start? Our recommendations:



1. Who We Serve



2. Services



3. About Us



4. Client Login



5. Blog

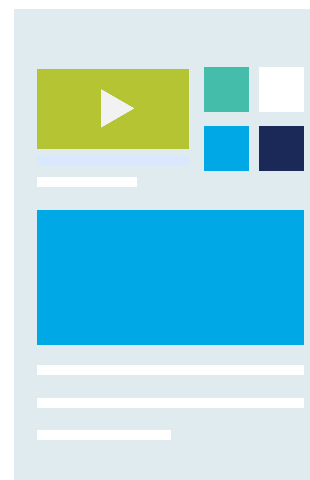


6. Contact Us

Step 5: Plan Your Content

You've probably heard recommendations to focus on a niche market and it's all for good reason. Having a deeper sense of who you want to reach will allow you to better position your copy to resonate with your audience so they spend more time on your website. When it comes to the copy on your site you must make it about your audience. Lead with what's in it for them. Viewers need to quickly understand the benefit – so content needs to be clear and concise.

Many don't know where to start when it comes to drafting web page copy. Use this section of the guide to jot down some ideas and main points that will showcase the personality—and the value—of your firm. And discover content from Advisor Branded Marketing (ABM) that is available and ready to use.



Homepage

Intrigue visitors from the moment they land on your homepage with a vivid value proposition that relates to their needs.

Prompts

- Who is your target audience?
- What are their challenges?
- Why should they be interested in a financial advisor?
- What step do you want them to take next?



Suggested ABM Content

Now that you know who you're targeting, you can source content in ABM that aligns with your audience. Prospects visiting your homepage may be considering whether or not they really need an advisor. It's your job to help them understand why they should take action. Videos in the Content Campaigns section are designed specifically to target unique market segments at this early stage in the decision process. Use the chart below to uncover videos in ABM that align with your target market.

Who is your target audience?	Which segment of your target audience would you like to reach?	Recommended ABM Video
Millennials...	who are in the early stages of building a strong foundation for their future – may have a first home, first child, and career. Those who may be thinking about 5, 10, 15 years from now, their goals and how they will get there.	You Got this
	who value experiences versus material items and are just beginning to think about their goals such as buying a first home, building a family, and growing in their career.	#Goals
	who may have seen the impact of the economic crisis on their parents' retirement and have lost faith in planning for retirement.	Not Your Father's Retirement
Women...	focused on their professional careers and caring for their families who do not yet have life insurance to protect their households' future financial well-being.	Protecting Those You Love Most
	who are primary caregivers for their children, partners, and parents and may not yet have prioritized caring for their own financial future.	Taking Care
	involved in the financial decisions of their households and seeking financial advisors who consider and understand their needs.	Taking Control

Who is your target audience?	Which segment of your target audience would you like to reach?	Recommended ABM Video
Baby Boomers...	interested in planning for an active retirement filled with travels and new adventures.	Young at Heart
	who want to ensure the future of their estate and the financial security of their families	Leaving a Legacy
	with children who want to plan for a transfer of wealth	Your Greatest Assets
Small Business Owners...	seeking financial advisors who understand their unique financial planning challenges.	Building on a Strong Foundation
	who prioritized their businesses and do not yet have exit strategies.	Exiting with Style
	drawn to the freedom and flexibility of owning a business, but who have not yet prioritized planning for their own retirements.	Investing in Yourself

About Your Business & Your Philosophy

Explain what your business specializes in and a brief history of how your business was founded.

- How did your business get started?
- Who?
- When?
- Why?
- What makes your business unique?
- What does your firm specialize in?
- List your business's accomplishments and awards.

Your business's core values and company culture mold your philosophy.

- Make sure you practice what you preach in your philosophy with every business endeavor.
- What are your business's core values?
- Jot down a few things about your business's culture.
- What is your philosophy?
- What does your philosophy mean to your clients?

Suggested ABM Content

Check out the **Content Library > Working with a Financial Advisor** section for videos that could be a good fit for this page. Here are some of the top videos:



Who We Are

Demonstrate how your financial expertise and ability can help clients get from where they are today to where they want to be.



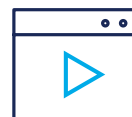
What We Do

If an established process for creating a financial plan is your specialty, consider adding this video.



Creative Planning

Demonstrate how your financial expertise and ability can help clients get from where they are today to where they want to be.



What It Means to be a Fiduciary

Is being a fiduciary important to you?
Consider adding this video to help prospects understand how it sets you apart from other financial advisors.

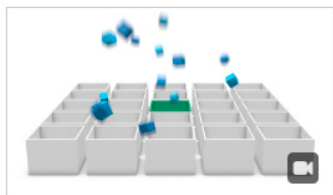
Services & Client Experience

Make sure you list your services, but more importantly, use this section to communicate your value and the value you add to the client experience. Your services go beyond planning—your clients are coming to you for financial advice and a unique experience.

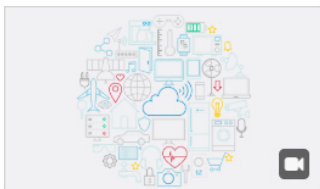
- What services do you provide?
- What does this mean for your clients?
- What can your clients expect when working with you?
How do you build and maintain relationships with clients?
- What makes your firm different?

Suggested ABM Content

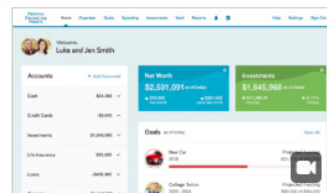
If your firm offers the Client Portal as part of your services, don't forget to highlight it on your website! Content that clearly articulates the benefits and value of the Portal is ready made and available from **eMoney Materials > Showcasing Your Value**.



You've probably heard of the **Life in a Box** video as it's our most popular by far. It focuses on how our financial situations become more complex with age. With a Financial Advisor and the Client Portal you can get organized and manage your financial life from one place.



Check out other videos such as **Speed of Access**. This video might resonate with tech savvy clients as it highlights how we use the Internet for almost everything so we should be using it for our finances.



If you want to keep it simple, check out the **Personal Financial Website Overview** which describes the features of the Client Portal.

Educational Content

Clients rely on your expertise to help simplify their financial lives. By educating them, you can become a trusted advisor. Share relevant industry content and/or create a blog where you can post best practices, tips, and your thoughts about industry trends.

What are some topics you know your clients and prospective clients would love to hear about? We'll help you out with the first two...

1. Retirement

4. _____

2. Education Planning

5. _____

3. _____

Suggested ABM Content

This is where ABM really has your back because we're continually adding fresh articles to the Content Library. Articles related to current events and the markets are released on a weekly basis to the **"Featured"** section of the Content Library, which also includes the newest content. As new articles are released, older articles are moved to the Industry Insights section so that they are always available. You can also browse for content by topic.

Pro tip: When you find an article you like, feel free to add your own commentary to make it your own.

Contact Information

This is one of the most important sections of your website. Make sure to feature it in all pages of your site. Have you included all of these channels and resources on your Contact Us page?



Address – include a link to Google Maps



Phone Number



Email – personal or a contact email



LinkedIn business page



Facebook business page



Twitter profile



Fax

Step 6: Define Your Brand Standards

Your brand is more than your logo or company name, it is the combination of your business's name, message, tone, symbol and design intended to identify your services so you stand out from your competition. Consistent branding makes your business recognizable. Your website, social media profiles, emails, and ads should all have a unified appearance so your audience recognizes they are all from the same company. This develops trust and stronger relationships with prospects and clients. Establishing these rules ensures your team and others know how to promote your brand properly.

The Basics of a Brand Guide Include:

Logo

Create a logo and provide rules about how it may be used. Ex. Logo color should never be changed.

Typography

Identify the font you will use across your website and print materials.

Colors

Select only a few colors and document the HEX or RGB color codes so the colors are consistent every time you use them.

Imagery

Describe the types of images that are acceptable and any that are not.

Tone

Describe the tone of voice that should be used in communications and copy.

Example of eMoney's Imagery Guidelines

Do's:

- Be sure latest technology is shown, both hardware and app.
- Photos should be clean, minimalist, positive, friendly. Relationship-centered compositions are preferred.
- Include diversity (gender, race, age, environments)

Dont's:

- Staged photos
- Heavily saturated photos

Step 7: Engage Your Audience

Your website is the anchor for all of your marketing efforts—direct users back to your site as often as possible!

- Remember those blog posts we mentioned earlier? Every time you post a new blog, be sure to post about it on social media too and include the link to view on your website.
- Add a login button for your clients to access their Client Portal. This is an ideal way to encourage clients to not only interact with your site, but also use their Portal.
- Creating downloadable content is an interactive way to engage prospects and clients. Think ebooks and infographics, which positions you as a subject matter expert for your prospects and clients who will likely return for more credible information. List some topics that would be relevant to your audience:

1. _____
2. _____
3. _____
4. _____
5. _____



Step 8: Help Prospects Find You with Search Engine Optimization

If someone searches for “Financial Advisor near me” will you show up in the top rankings of the results? Can your website be found and read easily? Search Engine Optimization (SEO) is the practice of optimizing websites to make them reach a higher position in search engine results. Many factors are considered in determining page rankings. Become familiar with some of the leading factors that improve SEO.

Keywords

Keywords are the words and phrases that users input to find you or your services.

- Utilize free tools such as Google Trends and Google Search Console to identify keywords
- Keep close variations of your keyword, related topics, and synonyms in mind

Links

Links help users navigate your website and make it easier for search engines to crawl/index your pages.

- Link each page to at least one other page on your site, within the text.
- Use keyword phrases that describe the destination page.
- Don't use more than 10 links per page.

Title tags

Title tags are displayed on search engine results pages as the clickable headline for a given result.

- Should be an accurate and concise description of a page's content
- Keep them 50 to 60 characters long

URL Structure

URLs that are shorter and easier to read are optimal for search engines to process and are more appealing to users

- Match URL to page titles
- Use hyphens to separate words
- Keep them under 60 characters

Mobile friendly

Your website must be mobile friendly and optimized for all devices! Having a strong digital presence that's accessible from anywhere is no longer a luxury—it's a necessity.

Check if your site is mobile-friendly by searching 'mobile friendly test' on Google and entering your URL.

Step 9: Track and Measure

To understand where you need to focus to improve the effectiveness of your marketing tactics, track and measure:

- Where your website visitors come from
- How they got to your website
- What keywords were used to direct visitors to your website



Call to Action

A call to action (CTA) is a crucial part of a website that compels a user to take action. CTAs usually link to a page that will capture prospects' valuable information. Without one, someone may come to your website, read your information, and leave. Examples of CTAs include Download Now, Call Us, Schedule a Meeting, etc.

1. What information do you want from your prospects?
2. What do you want your prospects to do?



Google Analytics

Create a free account with Google Analytics to track metrics and traffic on your website. You'll be able to track clicks, views, conversions, time spent on a page, and more.

Don't just view your Google Analytics reports. Tweak your website until you get it right. For example, test how your CTA does in a certain color or location on your site and see what works best.

[Click here](#) to create a free Google Analytics account and start tracking!

Step 10: Spread the Word

You did it! You've created an engaging website complete with perfectly crafted CTAs...but it will sit in cyberspace collecting cyber dust if your clients and prospects don't know it's there! Take a moment to plan how you will promote your new website.

Email

Craft an email inviting clients, prospects, friends, and family to visit your new website. How will you get them there? Remember to let them know what's in it for them—what can they expect to find on your website in the future?

Social Media

Craft a social media post showing off your new website to your followers on:

- Twitter
- Facebook
- LinkedIn

Hopefully you feel prepared to create or revamp your website so you can enhance client relationships, connect with prospects, and promote yourself and your services. There's one final activity to make sure you've crossed your t's and dotted your i's.

Phone Conversations

What are you going to say on the phone to direct clients and prospects to your new website?

Don't Forget to Add Your Website to These Places!

- Business card
- Email signature
- Social media profiles
- Marketing collateral
- Presentations



Go-To-Market Checklist

Check off each box that you have successfully completed.

- ☐ I have found several other advisor websites that I like.
- ☐ My domain name is short, professional, and related to my business.
- ☐ I picked a website service that will help me reach my business's goals.
- ☐ In 15 seconds, my audience can find these 3 important pieces of information:
 - ☐ Who I am
 - ☐ What I do
 - ☐ Where I do it
- ☐ I have a simple and clean navigation for each page on my website.
- ☐ My footer has links to all of the website pages, my contact information, and my social media channels.
- ☐ My content speaks to my clients.
- ☐ I am authentic and honest in my website content.
- ☐ My content reflects the quality of my brand.
- ☐ My website is an extension of me.
- ☐ I have created a blog with new blog posts.
- ☐ My About section highlights my accomplishments and how my business began.
- ☐ I have included my team's headshots, contact information, and links to their business's social media profiles.
- ☐ My website is in line with my business's brand standards.
- ☐ I've incorporated content from Advisor Branded Marketing into my website.
- ☐ My website is mobile responsive.
- ☐ My website can be found easily.
- ☐ I have keywords and title tags.
- ☐ My internal links provide a friendly site architecture.
- ☐ I continue to spread the word about my new/updated website through email, social media, business cards, marketing collateral, and phone conversations.
- ☐ I am using Google Analytics to track and measure my website metrics.
- ☐ I have a CTA.
- ☐ I am/will use these metrics to make adjustments to my website where needed.