LIVE WEBINAR

3 IDEAS THAT CHANGED DIGITAL MARKETING

For Insurance Agents in 2026

SPECIAL GUEST

Samantha Russell

Chief Evangelist, FMG

HOSTED BY

JASON WALKER

President, AR

WEBINAR BEST PRACTICES

Here's a quick rundown of how you can make the most of this live webinar session.

Q&A

Have a question for us during the webinar?
Ask us in the Q&A!

WEBINAR CHAT

Want to chit-chat?
Use the Chat feature on Zoom to start chatting.

RECORDING

Have to leave early?
We'll send you the webinar replay and upcoming schedule of webinars.

READY TO WIN?

AR swag giveaway!

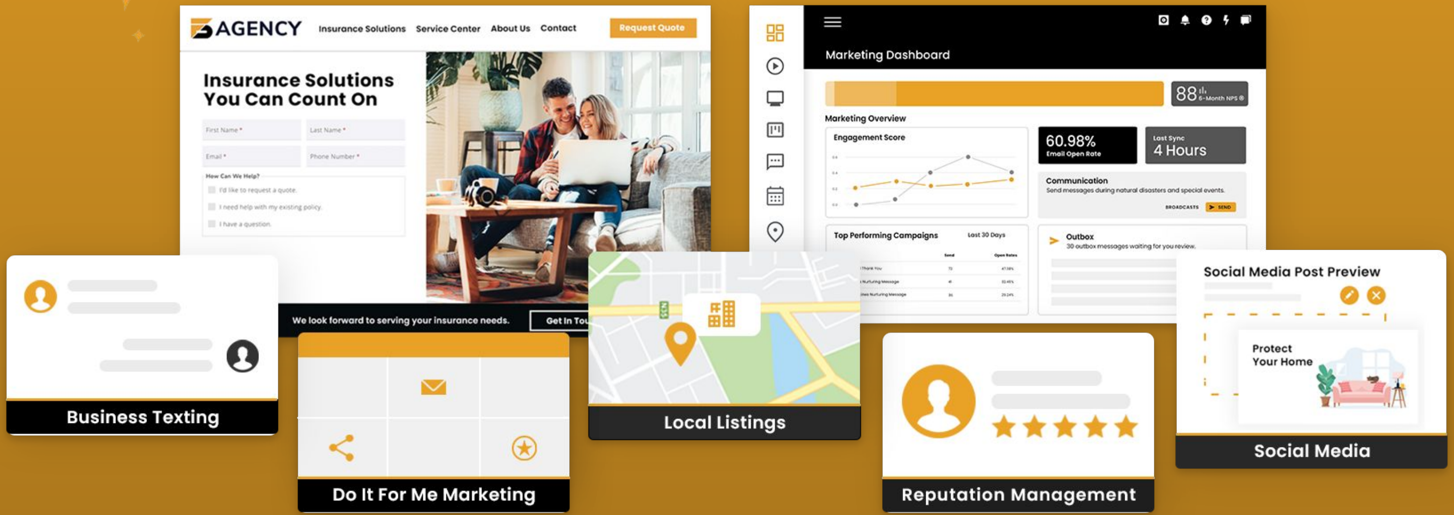
AGENDA

1. 3 CHANGES & IDEAS
2. SHOW UP WITH AEO
3. GET FOUND WITH LINKEDIN
4. CLIENTS TO REFERRALS
5. GIVEAWAYS
6. Q&A SESSION

What We Do

Complete Insurance Marketing Platform

Agency Revolution combines marketing automation, world-class websites, and powerful marketing tools to help you grow your business.



AR

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fmg

—

Samantha Russell

Chief Evangelist

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3 CHANGES TO DIGITAL MARKETING IN 2026

- ➔ 70% of Google searches are ending without a website click.
- ➔ AI pulls from LinkedIn to talk about your business.
- ➔ Only 11% of insurance customers are asked to be a referral.

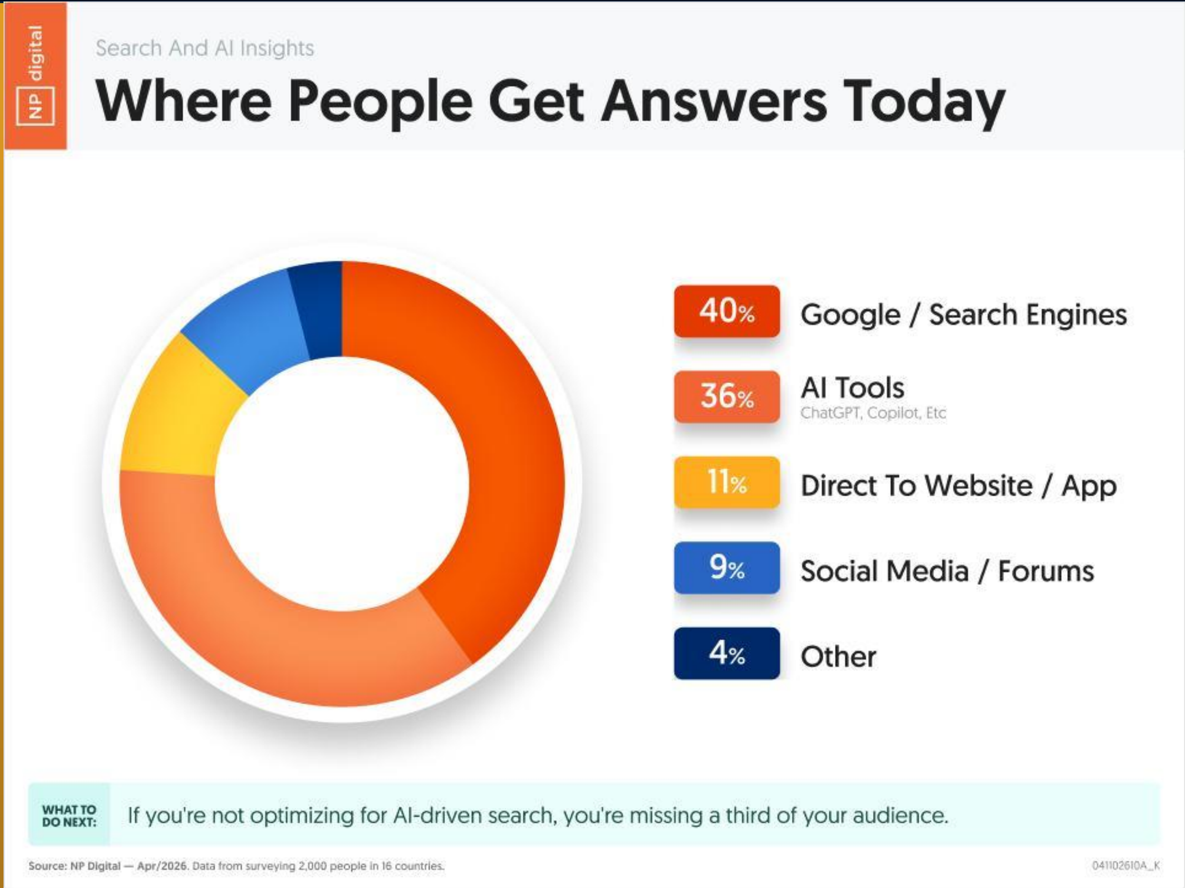
Here are 3 ideas to help your agency stand out.

✓ Foundational AEO Strategy

✓ Active LinkedIn Presence

✓ Referral Program

SEARCH & AI INSIGHTS



Source: NP Digital — Apr/2026. Data from surveying 2,000 people in 16 countries.

Discovery

ChatGPT
GPT-4o

Who should I consider as a financial advisor if I'm retiring in 3 yrs in the St. Louis area?

ChatGPT

For retirement planning near St. Louis, look for fee-only CFPs who specialize in retirement income planning.

Advisors often mentioned:

- Meridian Wealth Partners
- Cornerstone Financial
- Your firm? Not found.

Ask anything...

Evaluation

Claude
Anthropic

Look at this advisor's website. Are they a good fit for someone retiring at 62?

Claude

Based on their website, here's my assessment:

Strengths

· Fee-only, fiduciary stated
· CFP credential visible

Gaps found

· No client reviews online
· No retirement specialty content on site
· Last blog post: 14 months

Ask anything...

Selection

Gemini
Google

Compare Cornerstone Financial vs. Meridian Wealth for my situation.

Gemini

	Cornerstone	Meridian
Fee type	Fee-only	Fee-only
Reviews	47 Google	None found
Specialty	Retirement	General
Media	Forbes, KMOX	Not found
Content	Updated wkly	14 mo. ago

Gemini recommends:
Cornerstone Financial

This happened before they ever visited a website.

Ask anything...

Your next client is already doing this. The question is whether AI can find you.

Your online presence now has 2 audiences.

🤖 Audience 1: The Robots

AI tools like ChatGPT, Claude, and Gemini scan your entire digital presence **before any human ever sees your website.**

They're deciding right now whether to recommend you to a prospect — based on signals most advisors don't know exist.

→

👤 Audience 2: The Humans

Once a prospect sees your website or linkedin, etc you have <5 seconds.

They need to instantly see that you understand them that you **work with people just like them, speak their language, and have solutions to their problems.**

What converts them is completely different from what got them there.

WHAT AI IS ACTUALLY SCANNING FOR.

1 **Third-party reviews & social proof** /25
Reviews on independent platforms give AI 3× higher confidence to cite you

2 **Earned media & third-party mentions** /25
AI cares more about what others say about you than what you say about yourself

3 **AI-ready website content** /20
AI favors content written the way humans ask questions — not generic boilerplate

4 **FAQ & structured question content** /15
Question-format content appears in AI overviews 78% of the time

5 **Cross-platform consistency & local visibility** /8
AI builds entity confidence by finding the same info across multiple platforms

6 **LinkedIn profile quality** /7
Supporting signal for entity verification — not a primary citation driver

Total AEO visibility score /100

80–100	60–79	40–59	0–39
Strong visibility	Moderate visibility	Limited visibility	Invisible to AI

DEVELOP AN AEO STRATEGY

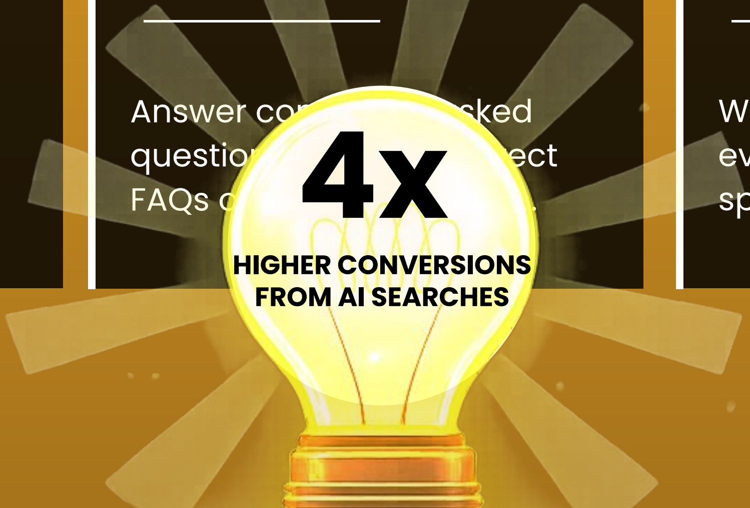
AEO is what helps you show up when people asks AI about insurance.

Research and Review

Compile a list of the most common questions your agency is asked by clients.

Create Frequently Asked Questions

Answer co[illegible]sked questio[illegible]ect FAQs o[illegible].



Go In-Depth With Blogs

Write blog articles that go even deeper into answering specific questions.

STAY ACTIVE AND ENGAGED ON LINKEDIN

Leverage LinkedIn to influence what AI has to say about your agency.

Optimize Your Profile

Set up your personal and business LinkedIn profiles following best practices.

Post Consistently

Determine a regular posting schedul
handle

LinkedIn Articles

Write and promote LinkedIn Articles on topics that relate to your agency’s focus.

“NO ONE COMMENTS OR LIKES MY LINKEDIN POSTS”

LinkedIn is no longer a play just for awareness. It’s way to get AI to recommend you.

Prospect asks AI

"Find me a CFP in Austin who works with physicians"

→

AI reads LinkedIn

Your headline, credentials, content and activity

→

AI verifies authority

Cross-references your profile with other signals

→

AI cites you — or doesn't

You either enter the conversation or miss it entirely

#2

Linkedin 2nd most-cited domain across AI platforms

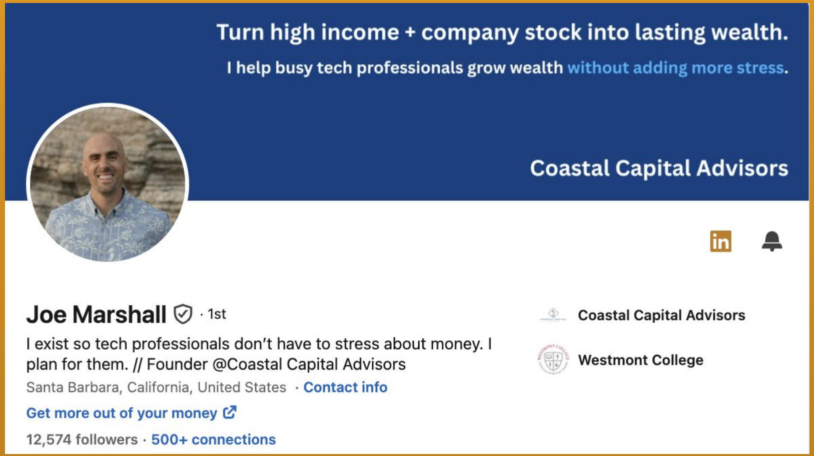
4–5x

more LinkedIn citations vs. one year ago

80%

of those citations are LinkedIn Articles vs posts

Your Profile: How AI & Prospects Find You



What AI (& Prospects!) read first, and how to fix yours.

YOUR HEADLINE: THE HIGHEST-LEVERAGE FIX

Generalists get lost in the shuffle. The more specific, the more conversions you will see.

The Formula: Role | Niche / Who You Serve | Location

LinkedIn allows up to 220 characters — use them to get specific

Before	After
✗ "Insurance Agent at [Firm Name]"	✓ "CPCU | Insurance Professional for Trucking Companies | Greater Washington D.C."
✗ "Helping clients achieve their goals"	✓ "Insurance Specialist | Serving Tech Executives & Business Owners | Austin, TX"
✗ "Passionate about insuring your business"	✓ "Insurance Experts for Physicians | Helping Doctors Build Wealth | Chicago, IL"

HEADLINE: EXACTLY WHAT TO WRITE

220 characters. Every word should earn its place.

ROLE

Your credential or title (the one most meaningful to your ideal client).

✓ **Use:**

- Insurance Credentials
- Risk Manager
- Insurance Advisor
- Insurance Specialist

✗ **Avoid:**

- Agent (too generic)
- Principal (means nothing to a prospect)

NICHE

Who you serve (be specific enough that the right person says 'that's me.)

✓ **Use:**

- Physicians & Healthcare Professionals
- Tech Executives
- Homeowners
- Business Owners in Need of Insurance

✗ **Avoid:**

- Individuals and families (too vague)
- Anyone who wants to build wealth

LOCATION

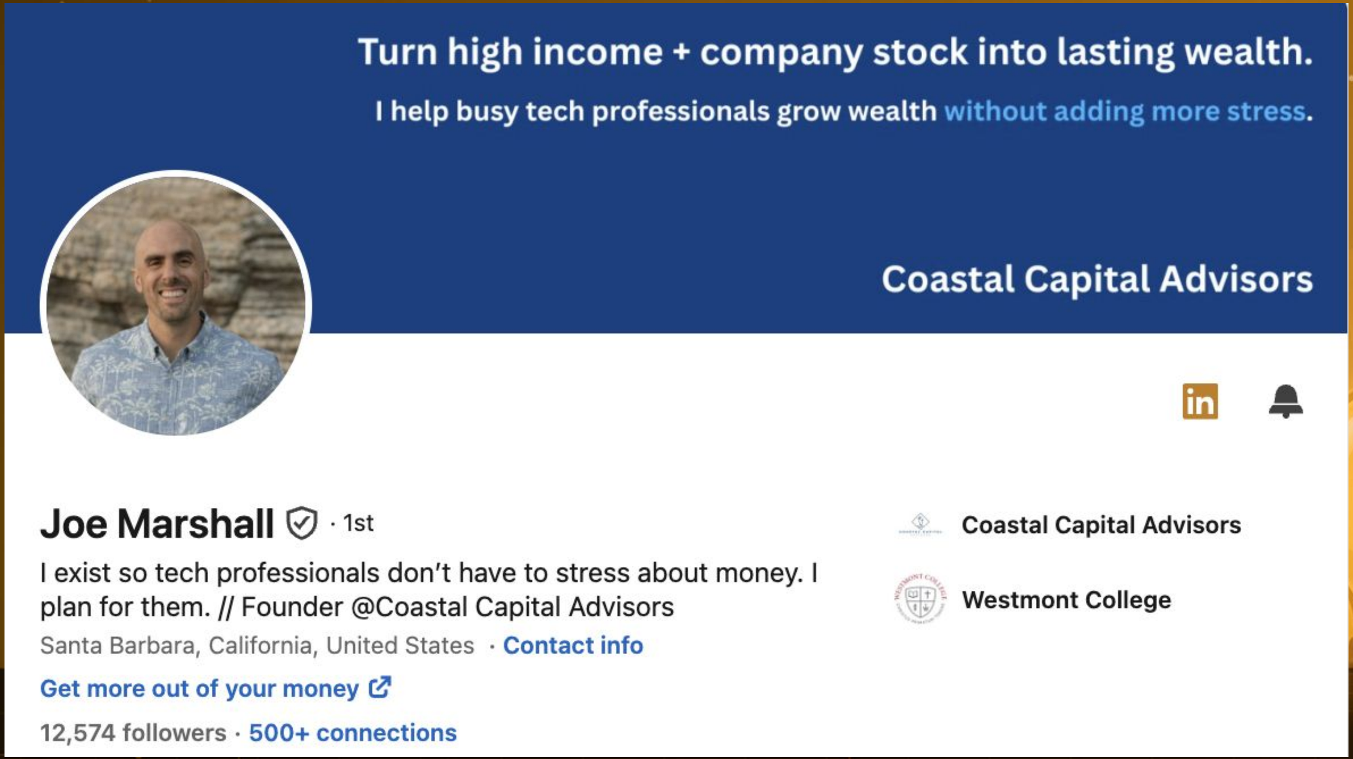
Where you practice (AI uses this to match you to location-based searches)

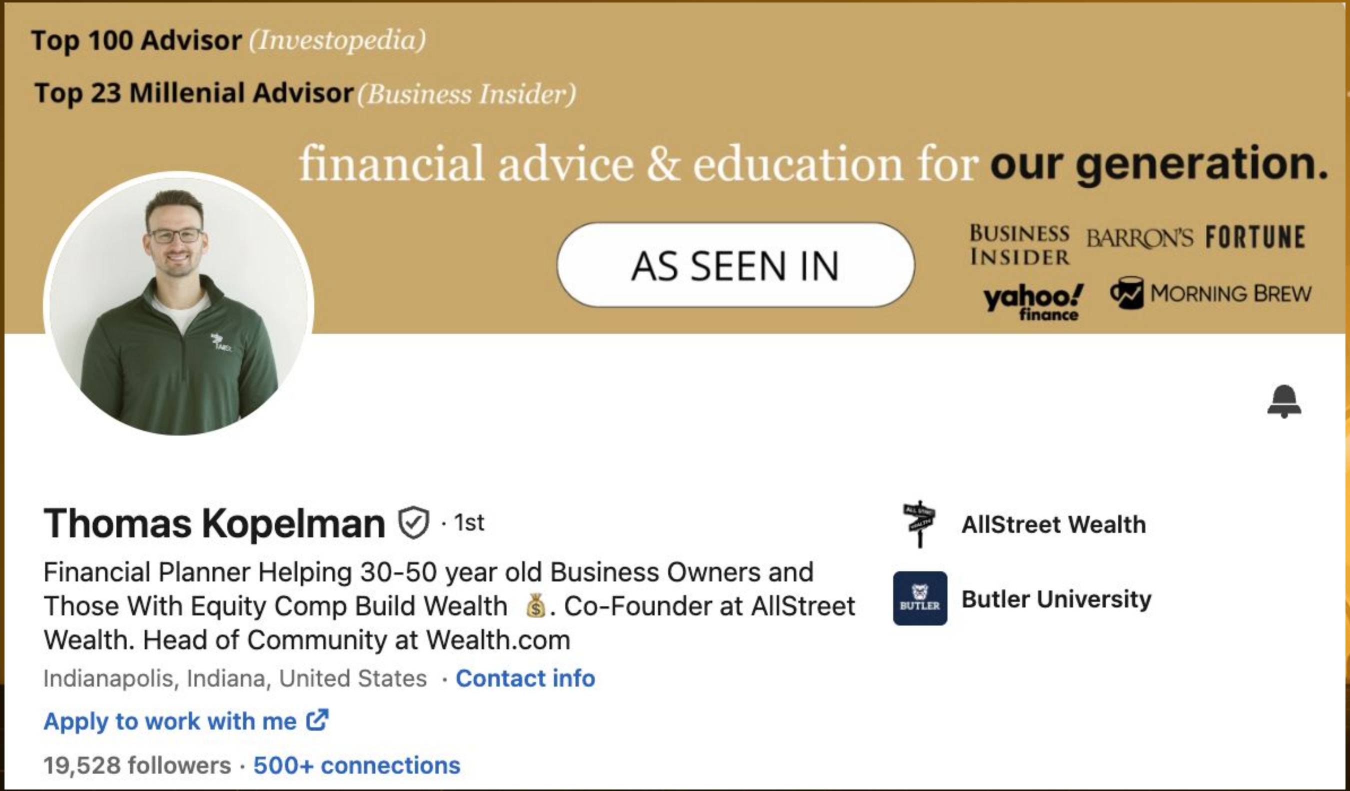
✓ **Use:**

- Greater Chicago Area
- Austin, TX
- Washington D.C. Metro
- Serving clients nationwide

✗ **Avoid:**

- Omitting it entirely
- Just a state with no city context


Turn high income + company stock into lasting wealth.
I help busy tech professionals grow wealth without adding more stress.
Coastal Capital Advisors
Joe Marshall · 1st
I exist so tech professionals don't have to stress about money. I plan for them. // Founder @Coastal Capital Advisors
Santa Barbara, California, United States · Contact info
Get more out of your money
12,574 followers · 500+ connections
Coastal Capital Advisors
Westmont College


Top 100 Advisor (Investopedia)
Top 23 Millenial Advisor (Business Insider)
financial advice & education for our generation.
AS SEEN IN
BUSINESS INSIDER
BARRON'S
FORTUNE
yahoo! finance
MORNING BREW
Thomas Kopelman · 1st
Financial Planner Helping 30-50 year old Business Owners and Those With Equity Comp Build Wealth 💰. Co-Founder at AllStreet Wealth. Head of Community at Wealth.com
Indianapolis, Indiana, United States · Contact info
Apply to work with me
19,528 followers · 500+ connections
AllStreet Wealth
Butler University

YOUR BANNER: THE MOST IGNORED REAL ESTATE ON LINKEDIN

Most leave it blank. That's a missed opportunity, because it shows on every comment you leave, everywhere.

Your specialty in plain language
"Helping physicians build wealth and protect their income" — not your firm's tagline.

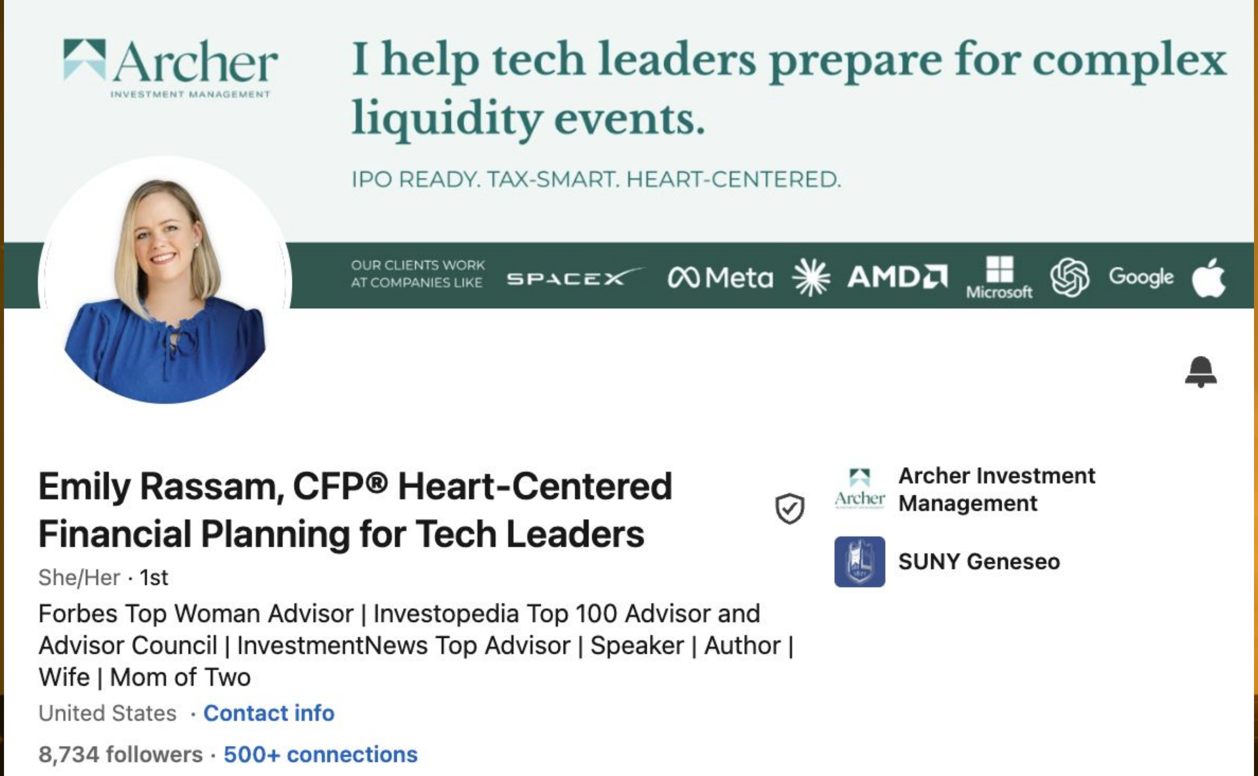
Your firm name or logo
Brand reinforcement. Prospects and referral partners notice consistency.

Bonus: A visual cue about who you serve
An image or icon that immediately signals your niche — a stethoscope, a city skyline, a courtroom.

Keep it uncluttered
One or two messages max. A busy banner reads as noise, not credibility.

Use Canva — it's free
Search 'LinkedIn banner' in Canva. Pick a template, swap in your colors and text. Takes 10 minutes.

Size: 1584 × 396px
Anything smaller looks pixelated on desktop. Design at full resolution.


Archer
INVESTMENT MANAGEMENT
I help tech leaders prepare for complex liquidity events.
IPO READY. TAX-SMART. HEART-CENTERED.
OUR CLIENTS WORK AT COMPANIES LIKE
SPACEX
Meta
AMD
Microsoft
Google
Emily Rassam, CFP® Heart-Centered Financial Planning for Tech Leaders
She/Her · 1st
Forbes Top Woman Advisor | Investopedia Top 100 Advisor and Advisor Council | InvestmentNews Top Advisor | Speaker | Author | Wife | Mom of Two
United States · Contact info
8,734 followers · 500+ connections
Archer Investment Management
SUNY Geneseo

ABOUT SECTION: TELL A STORY, NOT A RESUME

Write it in first person.

P1

Who you help + the problem you solve

"I help [specific client type] who are dealing with [specific challenge] figure out [specific outcome]."

P2

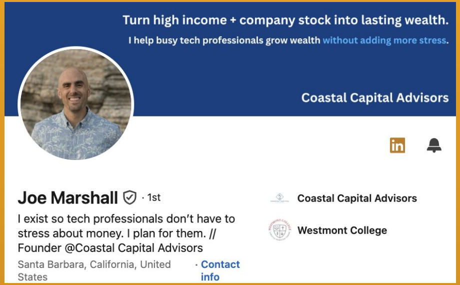
How your approach is different

"Most advisors focus on X. I focus on Y — because what I've seen is that [insight from experience]."

P3

Call to action — make it easy to take a next step

"If you're [situation], I'd love to connect. You can book a 15-minute call at [link] or message me directly."



About

From 2016 to 2020, I was in your shoes, working a high-paying tech job. The work was demanding, and I felt the pressure and burnout. I was making great money, but I also felt stuck.

So in 2020, I decided to walk away. But, before I did, I had a hunch.

I realized the traditional financial services industry was completely ignoring high-income tech professionals like us.

They were focused on serving retirees who already had big portfolios, overlooking a huge number of people in our generation who wanted and needed planning now, not in 20+ years.

So in 2020, I decided to walk away from my job. I helped launch Coastal Capital Advisors with a single mission: to help tech employees build financial plans that simplify their money, reduce stress, and become work-optional.

Since then, I've had the privilege of helping tech professionals achieve incredible results, including:
- Planning for equity compensation to make the most of their company stock.
- Creating a clear savings and investment plan for their future.
- Developing a tax strategy to maximize their wealth over a lifetime.

I didn't figure this out overnight. It took countless hours of research, practice, and hands-on experience helping dozens of tech professionals navigate their complex financial lives.

Now, I transfer all of that hard-earned knowledge to you so you can win with your money and build a secure financial future.

____

Here's exactly how I can help you. ⤵️

Free Resources (check out my featured section)

1) Daily posts
2) Free newsletter: Get a 5-minute email on the 2x / month with practical financial tips for tech professionals
3) Free guide: The Financial Planning for Procore Employees Whitepaper

Work With Me 1:1

See my featured section to schedule an intro call

____

I've helped 125+ families simplify their money, build a plan for their stock and savings, and minimize taxes

I want to help YOU use your money to build the life you actually want

Ready?

Either shoot me a DM or book a time in my featured section

YOUR FEATURED SECTION: 3 ITEMS, CHOSEN CAREFULLY

Featured sits directly below your About section — this is where conversions happen.

⭐ Slot 1

Your Best Content or a Media Mention

→ *A LinkedIn Article: "Should You Take Social Security at 62?"*
→ *A media feature: "As seen in Financial Planning Magazine"*

→ *A video: a 60-second intro or market update*

📅 Slot 2

A Direct Booking Link or Lead Magnet

→ *"Book a free 15-minute intro call"*

→ *"Download our Retirement Readiness Guide"*

→ *Link to your website's contact or scheduling page*

📄 Slot 3

A Second Piece of Content or an Event

→ *Second article targeting a different niche*

→ *Recording of a recent client webinar*

→ *An upcoming Event with a registration link*

Joe Marshall

I exist so tech professionals don't have to stress about money. I plan for them. // Founder @Coastal Capital Advisors

Featured

Link

COASTAL CAPITAL ADVISORS

Free Newsletter

2x / month newsletter for tech professionals

Free Newsletter

https://mailchi.mp/fd781696f237/tfp-landing-page

Link

COASTAL CAPITAL ADVISORS

Free Guide

Financial planning for Procore employees

Procore Financial Planning Whitepaper

https://mailchi.mp/751de6c609df/procore-whitepaper

Link

COASTAL CAPITAL ADVISORS

Discovery Call

For high-earning tech professionals who don't want to stress about money

Tech Professional Discovery Call

Calendly

Featured

Media

Investopedia Top 100 Financial Advisor

The Investopedia 100 celebrates financial advisors who are making significant contributions to critical conversations about financial literacy, investing strategies, life-stage planning ...

Media

EMPLOYEE BENEFITS PLANNING Leverage your ...

With over a decade of experience in working with Intel employees and their benefit plans, we can help you understand your options and map out the right strategy for ...

Media

5 WAYS TO OPTIMIZE YOUR EMPLOYEE BENEFITS The ...

Are you a Tech employee with various forms of compensation? Our latest guide highlights how you can maximize your compensation from RSUs, ESPPs, Options, and other ...

PROFILE AUDIT: WHAT AI (AND PROSPECTS) ARE CHECKING

☐	**Profile visibility set to fully public**	*Private profiles don't exist to AI or prospects*
☐	**Headline: Role | Niche | Location (220 chars)**	*The #1 thing AI parses first*
☐	**Summary written in first person, plain language**	*Avoid jargon — AI and humans both hate it*
☐	**Credentials/certifications listed prominently**	*CFP®, CFA, ChFC — these are verifiable authority signals*
☐	**Awards, media, and speaking listed**	*Honors & Awards section + Featured section*
☐	**Personalized LinkedIn URL**	*linkedin.com/in/[YourName] or [YourNameCFP]*
☐	**Profile photo is recent, high-res, professional**	*AI doesn't read photos, but humans do — they decide to trust you*
☐	**Profile reviewed and updated quarterly**	*Stale profiles give AI less to verify*

CREATE A REFERRAL & REVIEW PROCESS

Turn your most loyal clients into your #1 source of referrals.

Establish a Program

Setup a dedicated referral website page and form and link to it often.

Ask for Referrals

Use your A… target and au… to ask cl…

Respond Quickly

Develop a process to manage and contact referrals to create the best impression.

Take the Poll

Let us know if you’re interested in AR solutions.

Your Marketing Resource is On the Way

It’s Time for the Giveaway

The First 3 to Answer Correctly Will Win a Prize

READY TO WIN?

AR swag giveaway!

Test Your Knowledge

Who is credited for inventing the lightbulb? (And having the first “lightbulb moment.”)

And the Winners Are…

Your Questions

Post your questions in the Q&A

Agency Revolution

Explore Our **Insurance Marketing** Solutions

Phone: (800) 606-0477 ext. 2 (sales)
Email: grow@agencyrevolution.com

For support, contact our Client Experience Team at team@agencyrevolution.com.

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