



AEO & SEO Checklist for Financial Advisors

Use this checklist to help you with the key takeaways we discussed so you can start building your own AEO and SEO strategy. If you have a website with FMG, or are considering an upgrade, you'll see notes that show where our website already covers the foundations and helps you take the next steps.

01 Conduct Website Housekeeping

Ensure your website structure has the foundations in place for AEO and SEO.

Ask your web provider if your website images are compressed, optimized for SEO, and have alt-text included.

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Ask your web provider if your website has an XML sitemap setup, as this helps search engines index all pages.

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Ask your web provider if you have SEO titles and descriptions on your website pages.

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Ask your website provider if you have schema markup set up on your location pages.

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Ask your website provider if your website is mobile-responsive and works smoothly across all devices.

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02 Getting Started With the Basics

Initial steps to build your AEO and SEO strategy.

Ensure that your website includes pages or content for the services you offer.

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Build out location pages for each of your offices, and include relevant contact information.

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Research your local competition, see who comes up around you and who does not, and find opportunities for your SEO strategy.

Identify a niche that aligns with your firm's strengths, whether it is a specific audience you focus on, an area you serve, or a specialty.

03 Build Your AEO and SEO Strategy

Map out a plan for your ongoing strategy.

Develop a schedule to publish new content regularly and commit to it. Start simple and build from there.

Brainstorm and identify topics that fit your niche and resonate with your audience. Save these for future use.

Use Muse AI to draft blog posts around those topics quickly and consistently.

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Use Google Analytics to track how much traffic you get from your blog articles after publishing.

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04 Ensure Consistent Business Information

Maintain consistency across platforms to improve local SEO and AI visibility.

Create or claim your Google Business Profile and update it with your most current information.

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Review and update your business name, address, and phone number across your website, social media, and directories.

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Create a plan to regularly update listings with any changes, and consider quarterly or monthly audits.

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05 Manage and Encourage Client Reviews

Build credibility and improve reputation by managing reviews.

Create a plan to build up your client feedback strategy to get more reviews.

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Get your first review by encouraging a satisfied client to leave a review on Google.

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Develop a strategy to respond promptly to all reviews.

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Send your first reply to a client review you received online.

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Publish approved client testimonials, in text and video, directly on your website so AI tools can read them.

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Note: FMG Testimonials availability varies by firm type. IBD advisors may require home office approval.



06 Build Your AEO Visibility

Steps specifically focused on improving how AI tools find and recommend your firm.

Optimize your advisor bio to answer who you are, where you are located, who you help, your credentials, and how long you have been practicing.

Add a dedicated FAQ page to your website navigation using FMG's FAQ widget with schema markup.

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Add FAQ sections to the bottom of individual service pages and blog posts.

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Ensure your business information is consistent across your website, LinkedIn, Google Business Profile, and all directory listings.

Update your LinkedIn headline to include your niche, location, and the specific problems you solve.

Pursue at least one earned media opportunity this quarter, such as a podcast appearance, publication feature, or industry award.

Showcase your earned media on your website: add publication logos, links to articles you've been quoted in, and podcast appearances (with transcripts).