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# Mastering the 5-Second Rule:

## How to Create a Website That Converts

**Samantha Russell**
Chief Evangelist
at FMG

**Melissa Thomas**
President at
Advisor Brand Builder

# An award-winning marketing suite.
# Built just for you.

**2024**

**#1 in Digital Marketing**
T3 Advisor Software Survey 2024

**Practice Management Solutions Provider of the Year**
Wealth Solutions Report 2024

**Top in Customer Satisfaction**
T3 Advisor Software Survey 2024

2024

**2022 & 2023**

**Best Marketing Automation**
WealthManagement Industry Awards 2022

**Social Media**
WealthManagement Industry Awards 2022-2023

**Executive Leadership Award For Fintech Platforms**
ThinkAdvisor Luminaries 2023

## Our expertise is showing off yours.

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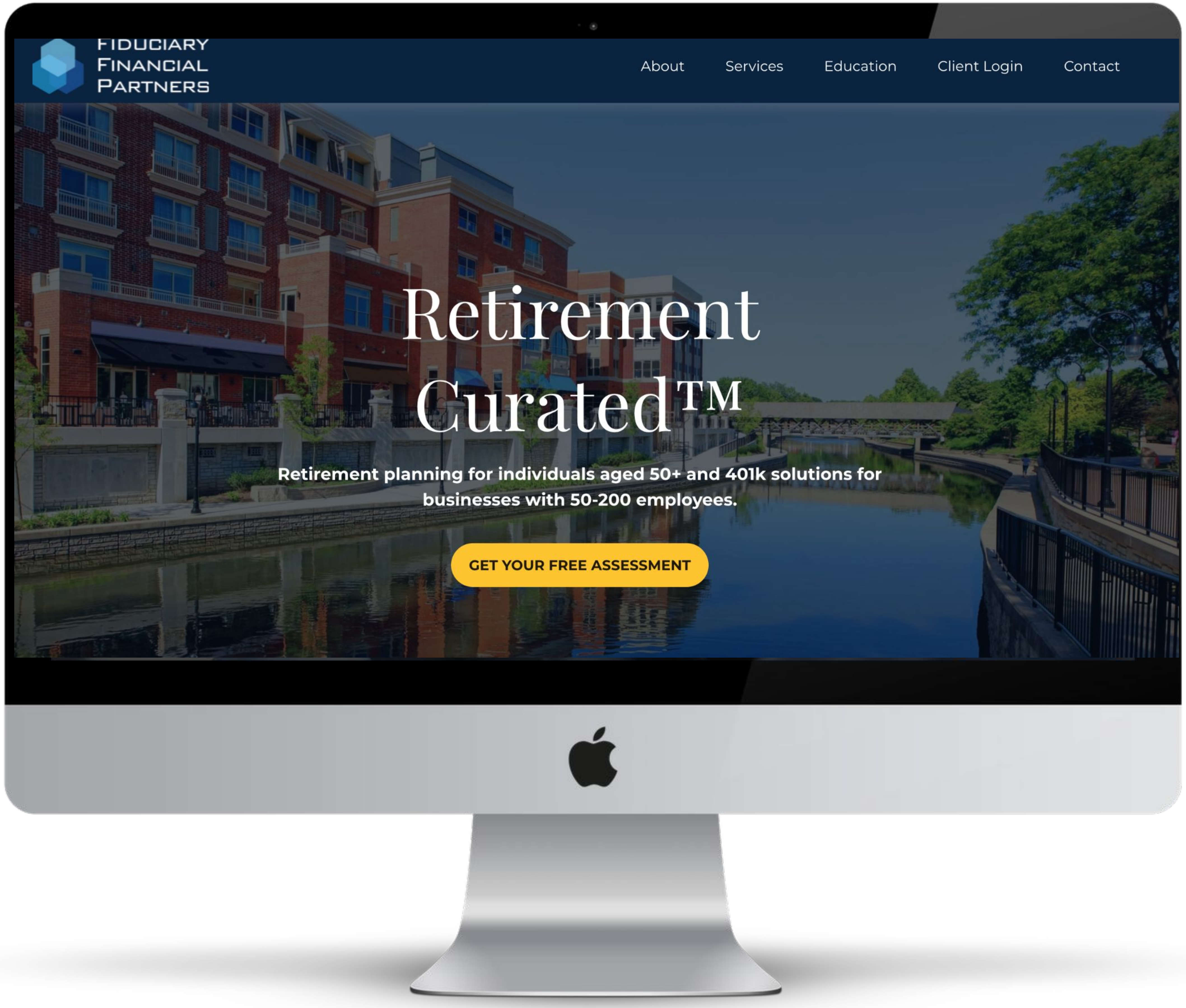
5 Second Test

# #1

## Does Your Website
## Pass the 5 Second Test?

Before Sending Leads To Your Site, Ask:

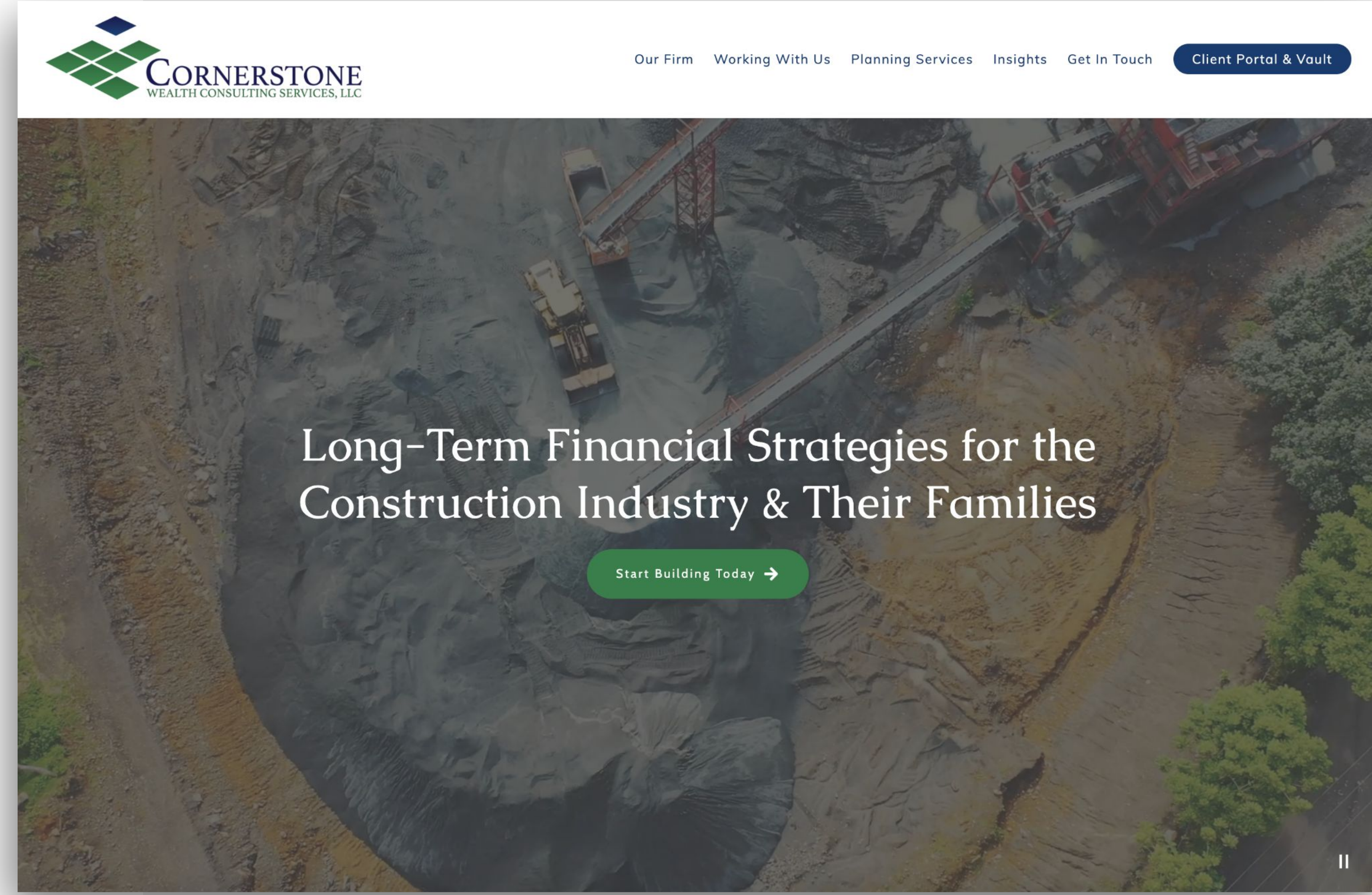
**Does My Website Pass The 5 Second Test?**



# You Have 5 Seconds To Make a First Impression

**Show your website, count to 5, then ask:**

- What was the page about?
- What do you remember seeing?
- Who would benefit from this service?
- What action to take next?

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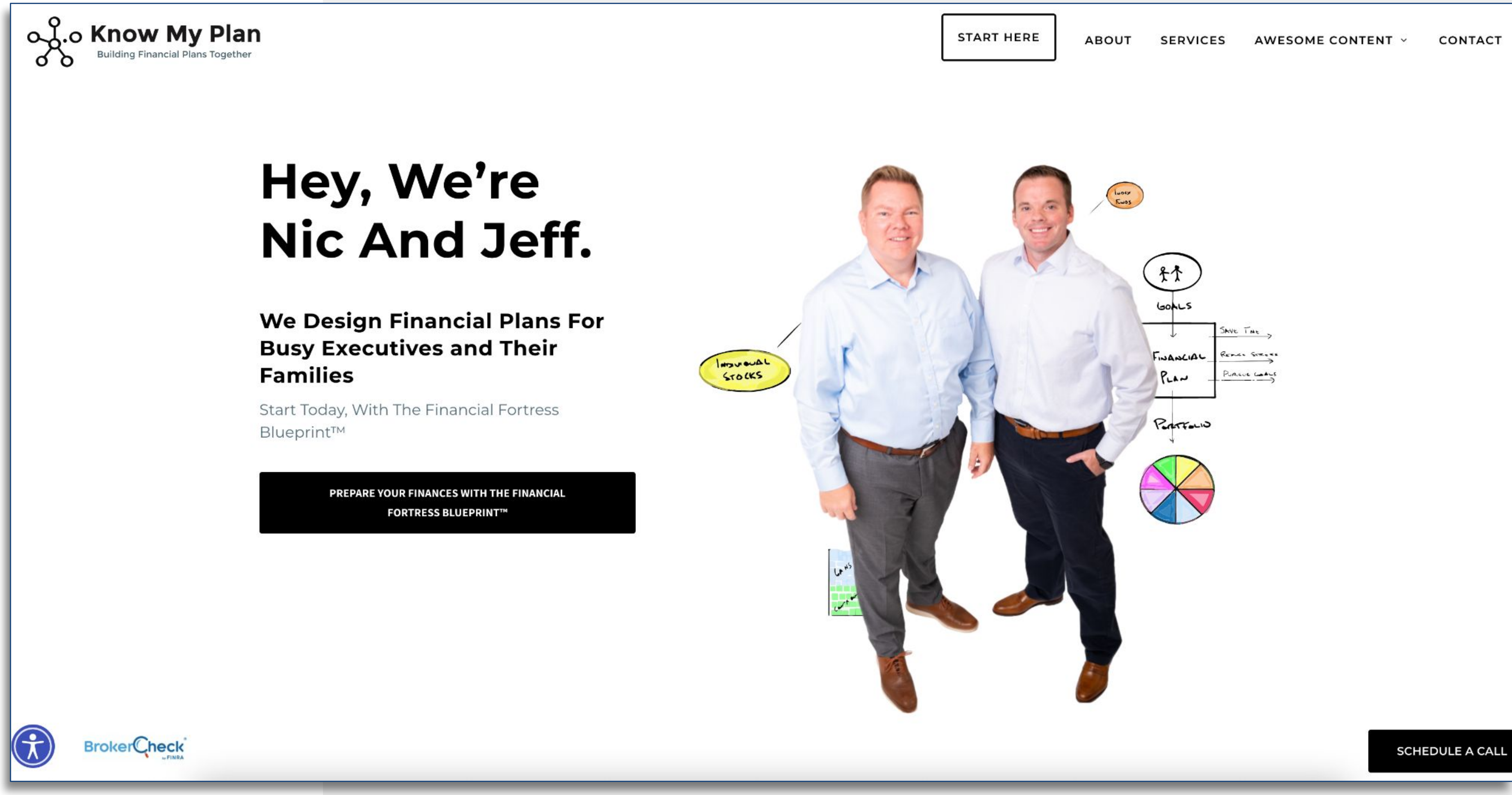
# Copy + Image + UX

➡️ **Copy:** Who you are, what you do, who you do it for

➡️ **Image:** Should reinforce the copy

➡️ **UX:** Where do you want visitors to click next?

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# Copywriting

Write HOW PEOPLE TALK!

➡️ What is the **PROBLEM** your clients/customers & prospects have?

➡️ What is the **SOLUTION** you provide to that problem?

## Does This Sound Familiar?

- You have a lot going on with your finances — and you're stressed because you know you don't understand the full picture
- You don't have the time or the desire to wrap your head around everything that's going on with your money
- You often worry about putting your kids through college or whether you're prepared to handle major life events
- You feel like there's more you could (and should) be doing with your money, but you keep putting it off, because you have no idea where to start
- You'd love to "outsource" your finances, so someone else can handle them while you're busy living your life

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# Which message will allow someone to know if you help people just like them?

❌

We Help Businesses, Families And Individuals Plan, Set And Achieve Financial Goals

✅


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How confident are you that your current website passes the 5-second test?

a) Very confident

b) Somewhat confident

c) Not very confident

d) Not confident at all

What do you think is the best way to improve your answer?

a) A Clear Value Prop & Messaging

b) Modern, High Impact Visuals

c) Compelling, Engaging Content

d) Direct & Clear Calls to Action

Website Messaging

# #2

LACK of clear messaging is the number 1 reason sites fail the 5 second test

# A Great Brand is One of Your Most Powerful Assets

## When Building a Website …

### Establishes Credibility

Because you never get a second chance to make a first impression, a polished, professional looking brand (on point logo, matching colors, high end graphics, etc) instantly shows visitors you're a pro.

### Builds Trust

Today, financial advice is easy to come by. Your brand messaging, and how it's portrayed on your website is often the first way to earn the trust and build confidence with prospects and clients.

### Promotes Engagement

Unique-to-your-firm messaging and cohesive visuals that resonate with your target audience makes them feel seen, understood and valued … and more likely to engage with your content *and* your services.

### Supports Differentiation

Bottom line—professional, consistent branding does more than show that you're competent; it sets you apart from the competition and establishes why your firm is worth working with.

# And When Growing Your Business ...

75%

of consumers judge a company's credibility based on its visual design

Stanford Persuasive Technology Lab

73%

higher revenue earned by companies with strong, and valuable branding

Harvard Business Review

13%

the increase in price companies with a strong brand are able to command

Harvard Business Review

# The Do's & Don't of Great Website Branding …

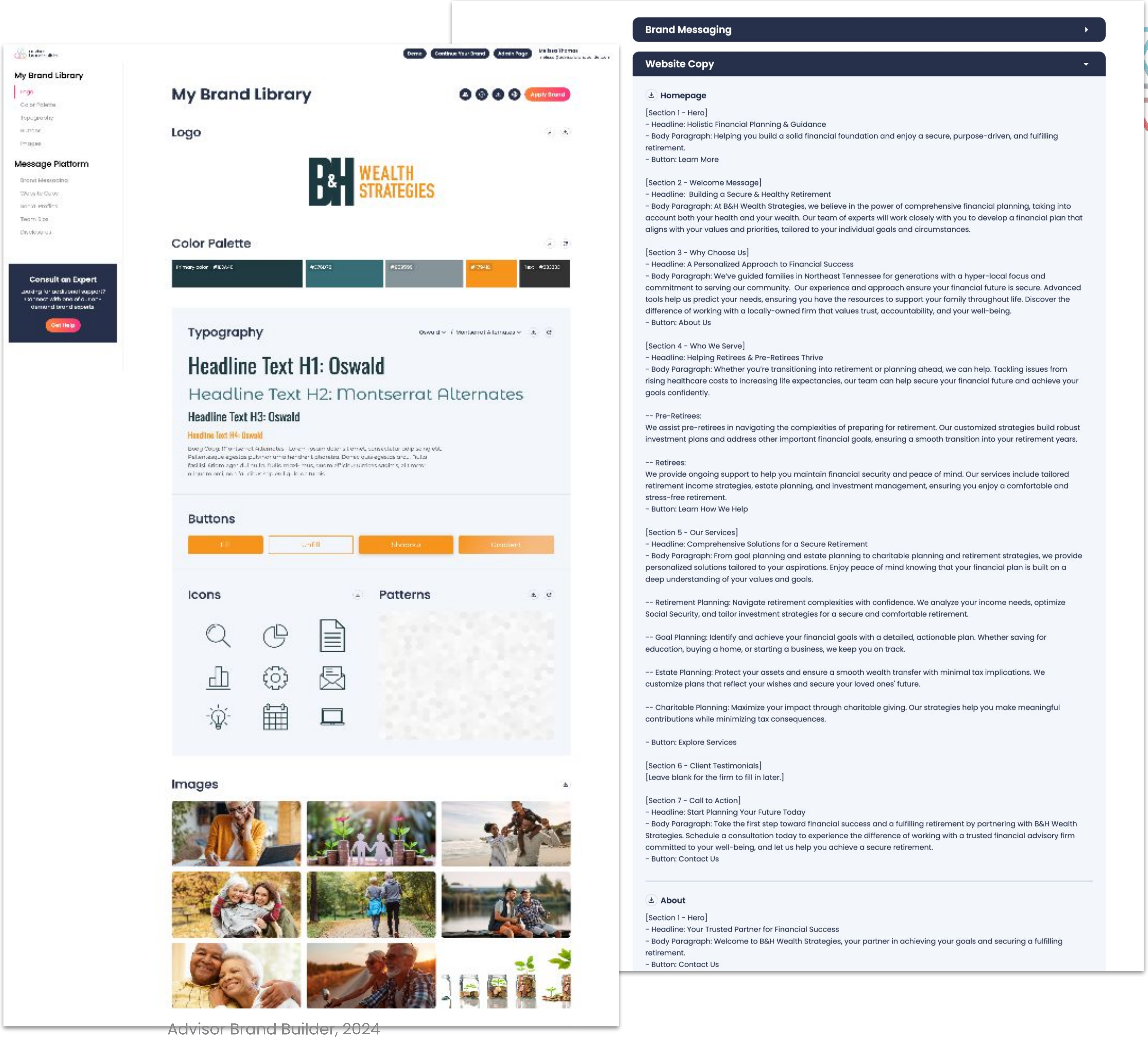
*Brands That Need a Boost …*

- ❑ Have a great story to tell but often need support to tell it
- ❑ Have dated or inconsistent visual elements
- ❑ Lack a unifying brand and professional aesthetic that boosts credibility
- ❑ Risk that the firm, no matter how great, will be judged by the cover (not the book)

# The Do's & Don't of Great Website Branding …

*Strong Brands Do …*

- ❑ Deliver clear, compelling and custom brand messaging that's unique to you
- ❑ Feature coordinated & captivating visual elements
- ❑ Use high-quality imagery & graphics
- ❑ Make it easy to know how to engage with you through strong Calls to Action



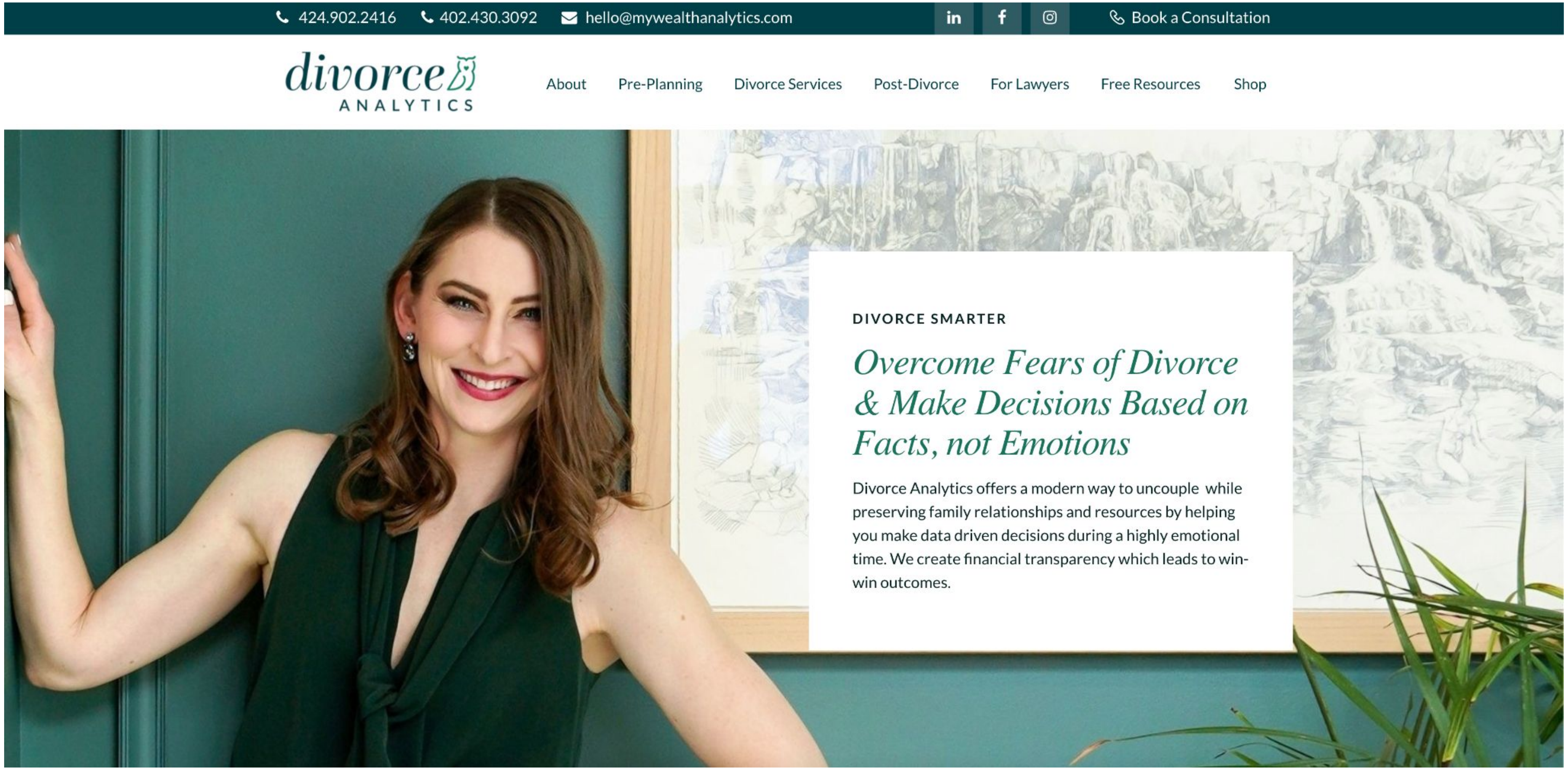
Great Branding Case Study

# #3

## A Case Study in Building a Great Advisor Brand & Website

# Proven Strategies for Crafting Compelling Brand

## Let’s use Victora Kirilloff, CDFA®, NCPM®, CDS® as an example

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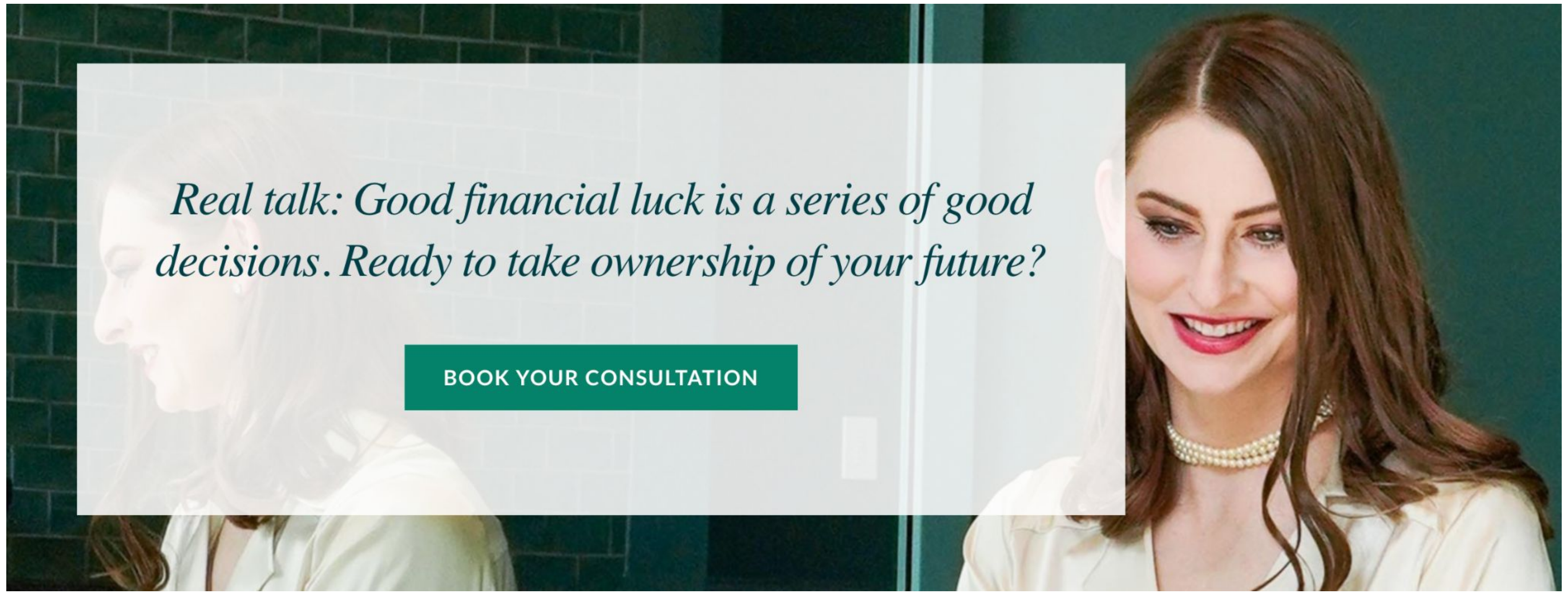
# Proven Strategies for Crafting Compelling Brand

- **Be Authentic.** Think carefully about what actually makes your firm unique—and the reasons *real* clients like working with you




The financial decisions you make immediately after the divorce can impact the rest of your life.

But we get it - if you have never been the financial decision maker in the family, it can be difficult to transition into that role smoothly.

Our clients want financial independence without the golden handcuffs of wealth maintenance taking over their whole life. And that's totally possible.

Partnering with us isn't just about making sure the bills are paid on time.

We come in to uncover where the money is going and design a sustainable financial ecosystem (asset + debt management, investment strategies, etc.) to ensure our clients' long-term financial security.

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# Proven Strategies for Crafting Compelling Brand

- **Be Specific.** Know your audience, the challenges they face, and how your firm helps solve them

*Meet Victoria Kirilloff*

CDFA®, NCPM®, CDS®

As a Certified Divorce Financial Analyst®, Certified Divorce Specialist®, and family mediator, Victoria enjoys distilling extraordinarily complex financial situations down into usable divorce data points. She works closely with clients to bring their financial picture into focus and to turn fear into facts.

Victoria feels very passionate about helping others understand all implications as well as impact of their decisions. Having her own experience with separation, she uses financial analysis & mediation to resolve financial disputes and create outcomes both parties can agree on.

Divorce is not easy, but Victoria's bright light creates solutions.

Whether you're considering filing for divorce, have recently filed, or still wondering how to handle the divorce announcement, we've got you covered.

**We get that there are too many unknown factors, and every decision counts. Your relationship may be coming to an end, but you want to do the right thing.**

That's why you need solid answers to questions like:

"Will I need to go back to work?"
"Can I afford this lifestyle?"
"Should we sell the house?"
"How do we handle child-care expenses after the divorce ?"

We're here to guide you towards clarity with the right financial facts so you can leave your marriage peacefully and transition to the next phase of life comfortably.

# Proven Strategies for Crafting Compelling Brand

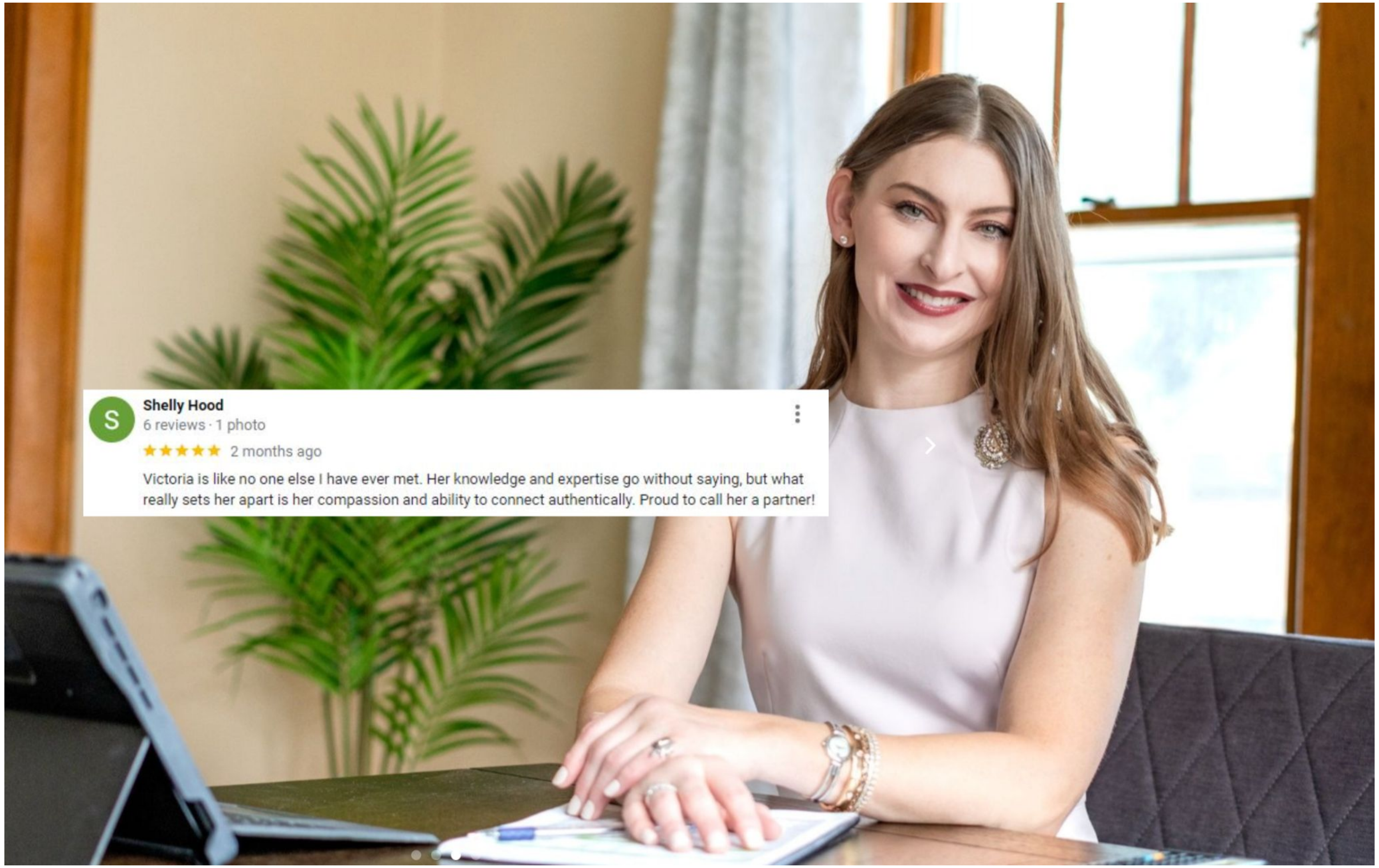
- **Be Clear.** Use language and visuals that are compelling and speak directly to your target demographic

This service is perfect for you if:

- Your partner handled all the finances in the family, but you're not sure how to untangle everything and get the bills paid on time
- You want to make smart decisions about your money and live comfortably, but you're not even sure where to start
- You're worried about the longevity of the cash flow and your post-divorce lifestyle
- You want to safeguard your money and assets from potential future threats (if and) when you're ready to date again

# Proven Strategies for Crafting Compelling Brand

- **Be Consistent.** Use a consistent tone and style across ALL brand touch points, both on and offline

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# Proven Strategies for Crafting Compelling Brand

- **Be Direct.** Include clear calls to action, making it very easy for your audience to understand what steps to take next

## *Your Divorce Doesn't Have to Destroy Your Family Financially*

Taking control and ownership of your life and making financially smart decisions when it comes to initiating a divorce can be overwhelming and daunting. You may feel confused about where to start or what steps to take. Not having enough information or a clear guide may make you feel anxious about the financial implications.

Divorce Analytics is here to help you let go of that fear by providing fact-filled, data-driven roadmap of your divorce and financials while creating win-win solutions that both parties can agree on.

BOOK YOUR CONSULTATION

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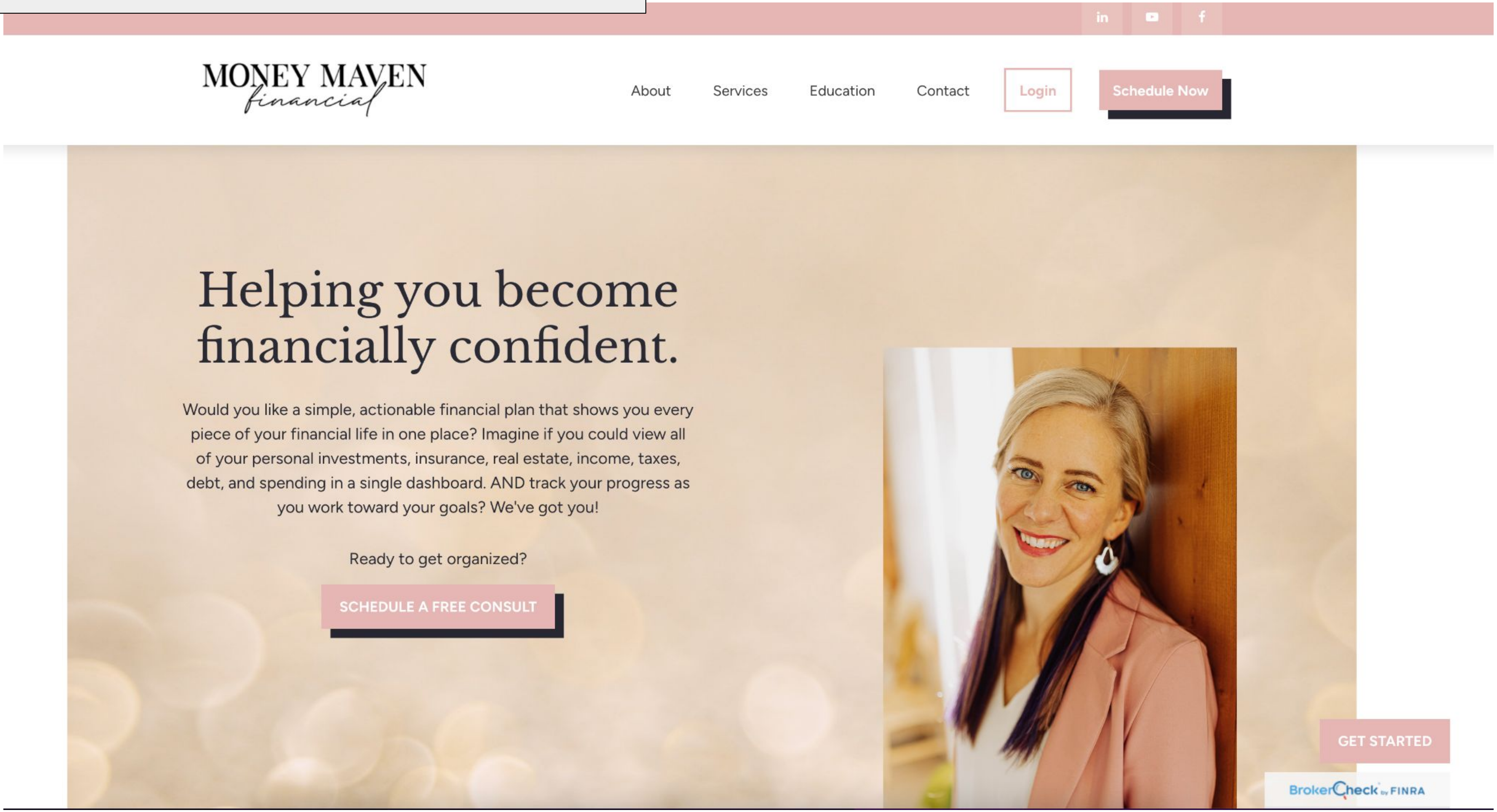
Example Websites

# #4

## Let’s Look at Great Website Examples from FMG clients

# Great Website Examples

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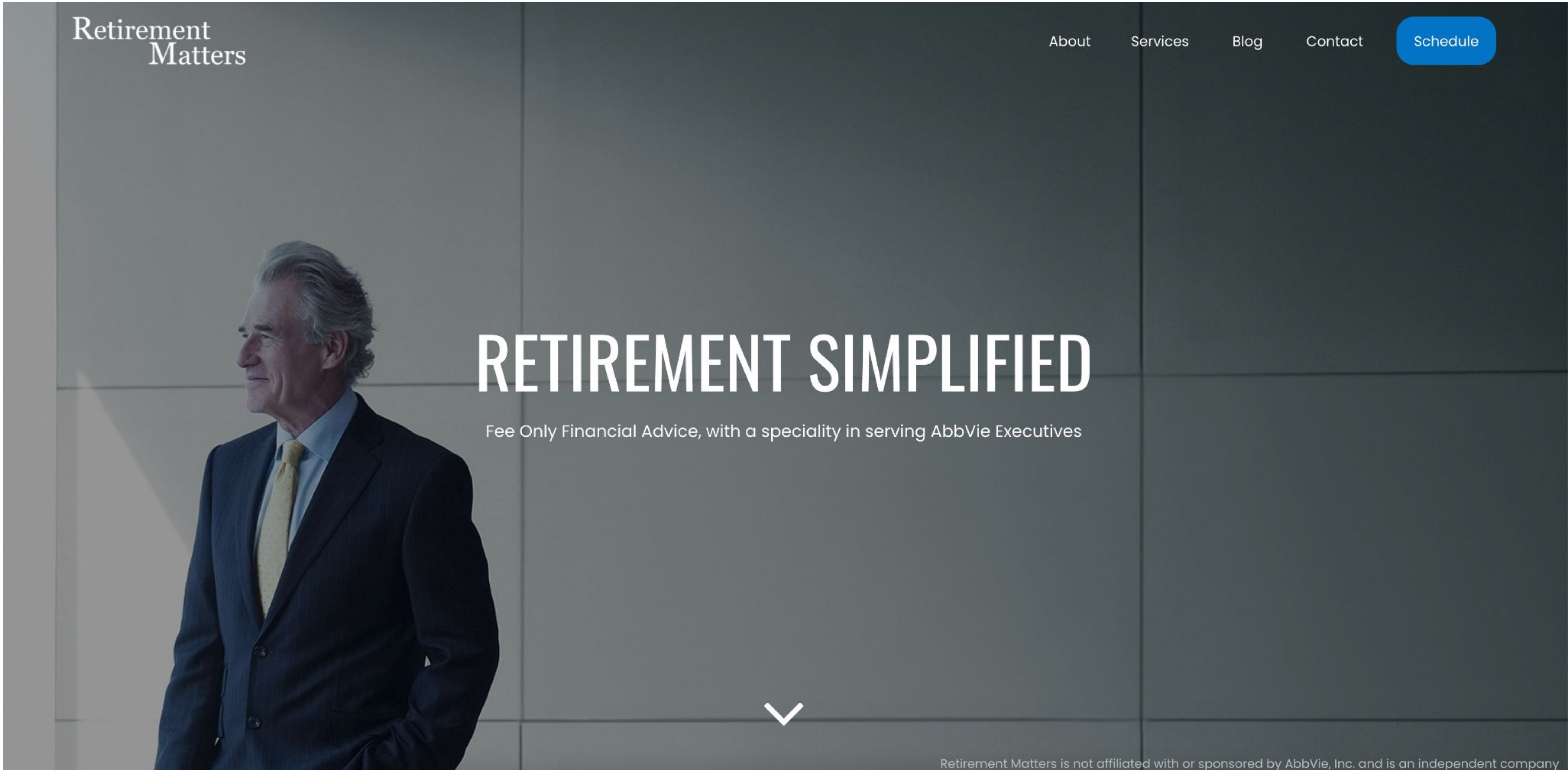
# Great Website Examples

# Great Website Examples



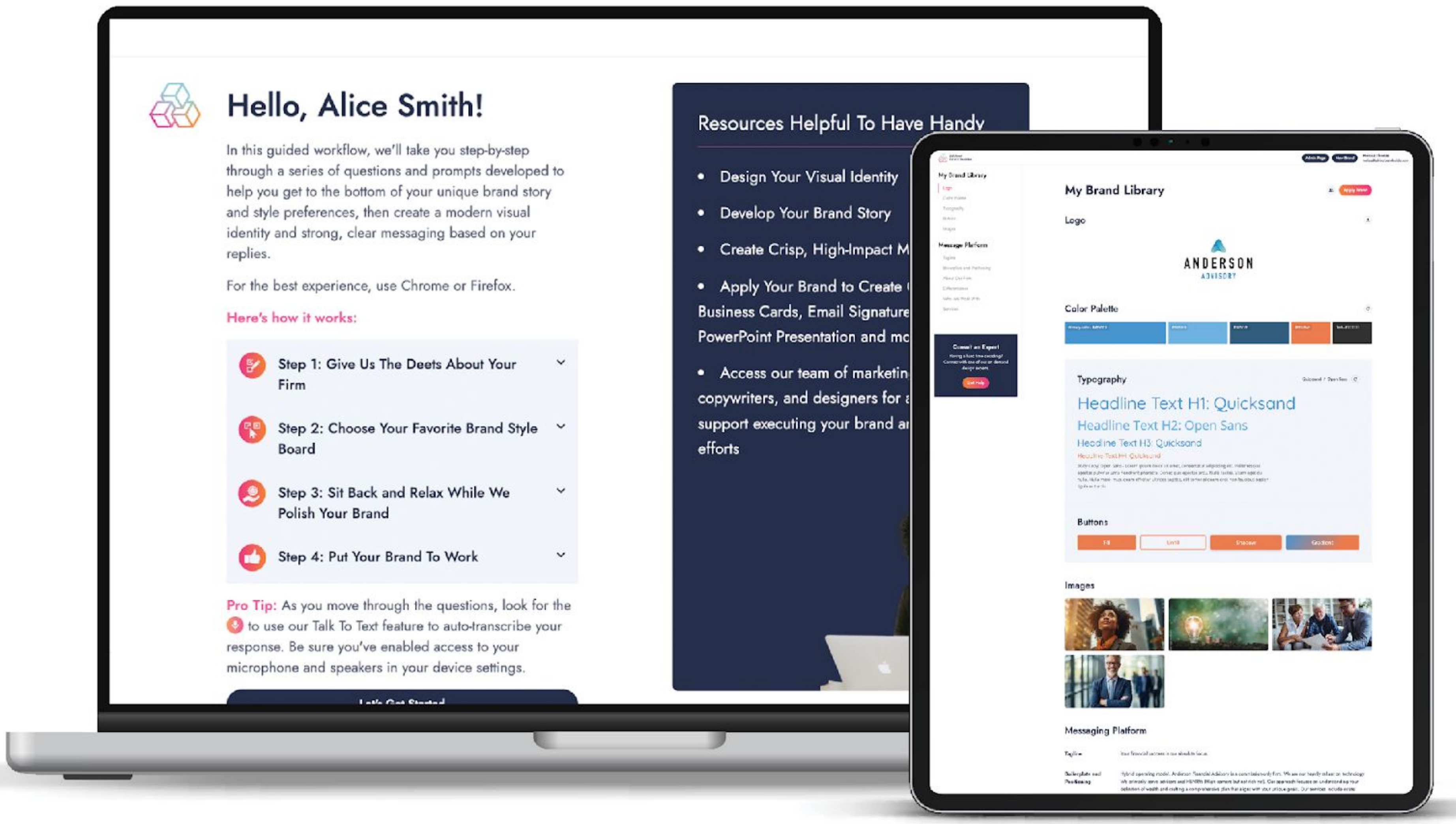
5 Second Test

# #5

## Advisor Brand Builder + FMG

# Advisor Brand Builder”
# The Simplest Way for Financial Advisors to Build a Strong Brand

Our interactive platform empowers advisors to create **professional, high-impact visuals and unique, clear messaging** for a fraction of the typical cost and time.




## A Complete Brand Identity

- An expertly designed, unique-to-you logo, color palette, and other graphics
- Crisp company messaging

## Ready-to-Use Marketing Tools

- Like business cards, presentation templates, social media graphics and more automatically designed in the style of your brand

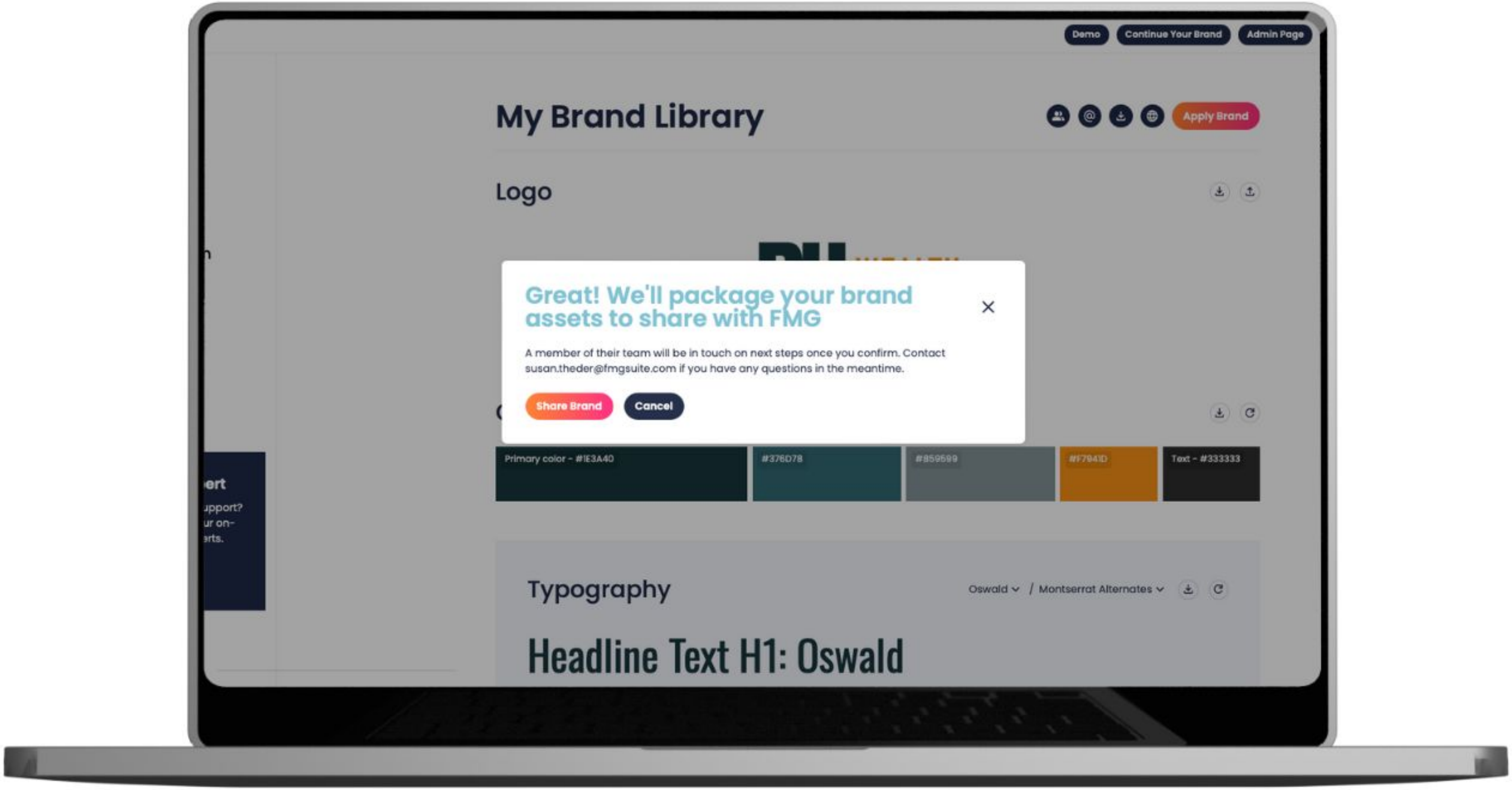
## Professional Guidance & Support

- An experienced brand concierge available to guide your process
- Expert design and content resources to give your brand a professional polish

# How Advisor Brand Builder Works

## The Power of Innovation, Expertly Blended with the Perspective of Experience

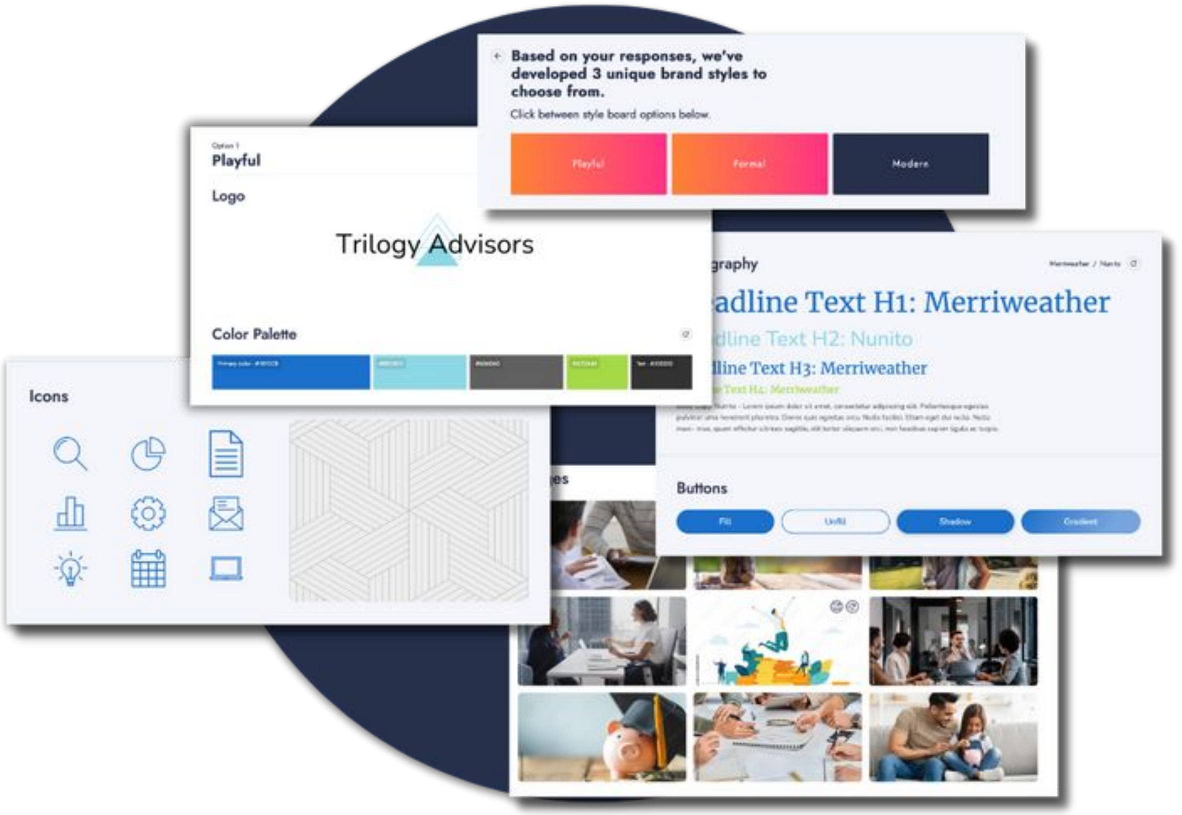
- Our **Intuitive, Self-Guided Discovery Workflow** walks you through a simple set of questions to help you define and develop your personal brand style and story
- **Three Custom & Customizable Visual Brand Identities,** including a logo, colors, imagery, and more, and **Crisp, High-Impact Brand Messaging** are generated within minutes
- After selecting your favorite brand style board, **our Team of Design and Content Pros Step in to Finalize Their Custom Logo, and Give the Full Board a Professional Polish**
- **Matching Brand Assets**, like business cards, social media graphics, presentation templates and more, can then be built and downloaded with the click of a button
- **Our FMG Partnership Makes it Simple to Share Brand Assets and Build** a beautiful, differentiated website



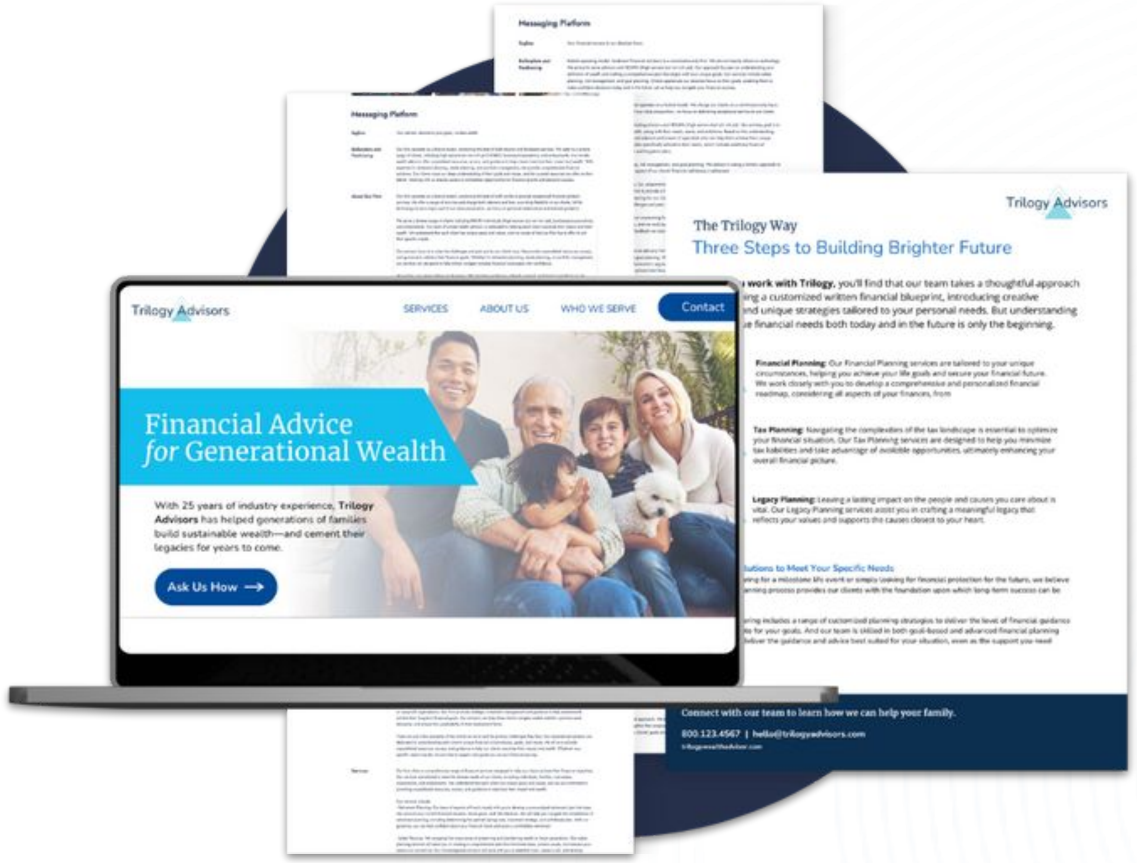

Advisor Brand Builder, 2024

# What You Get

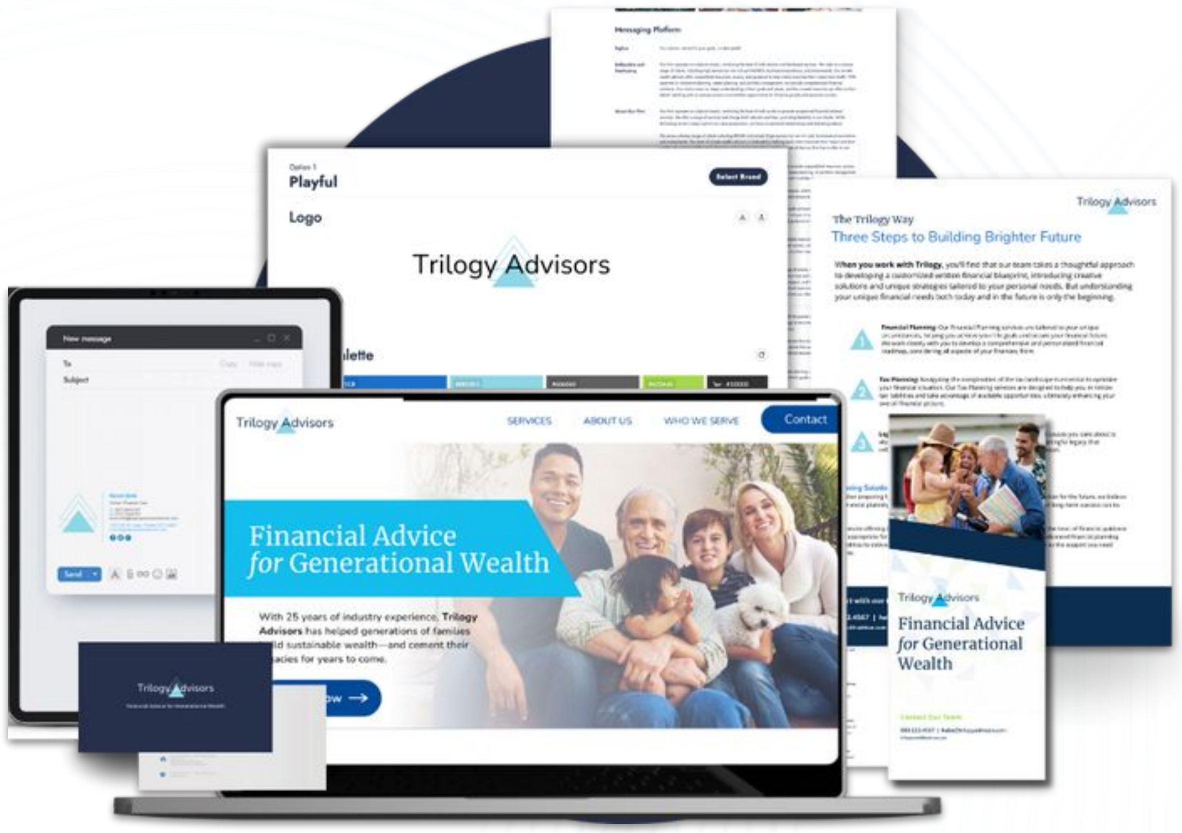
## A Unique Visual Brand




## Compelling Messaging




## Turnkey Marketing Assets




- Custom logo ideas, ready for our team's professional polish
- Balanced and functional color palettes
- Typography and font selections
- Brand icons and patterns, and
- Interesting stock photography reflecting your target audience

- Boilerplate
- Individual & Firm Bios
- Unique Value Proposition & Differentiators
- Website Copy for Home, About, Services and Audience pages

- Professional business cards
- A custom email signature
- Firm stationary
- PowerPoint templates
- Social media profile graphics,
- And more added monthly

- **Advisor Brand Builder** = Creates the Brand Identity, Messaging, Foundational Brand Assets

- **FMG** = Takes that brand and messaging creates a beautiful, lead-converting website and supports it with ongoing emails, social posts and content

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A special offer for Webinar participants …

## Win a Free Brand from Advisor Brand Builder

www.advisorbrandbuilder.com/FMG-brand-makeover

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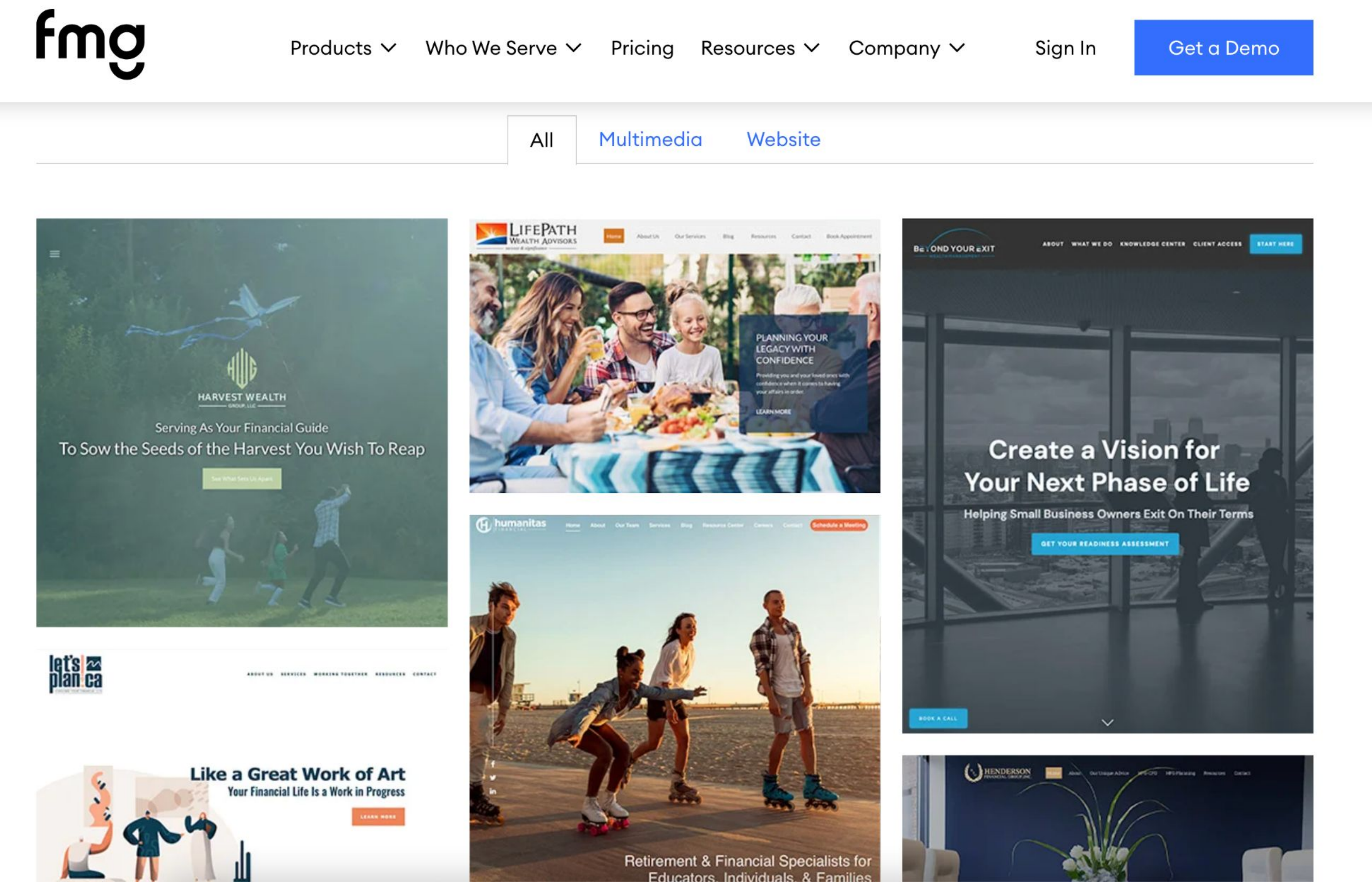
# Check out our website gallery



# FMG's "Do It For Me" Marketing Program

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## Do It For Me Calendar | April 2024

Check out the content recommendations.

The default is to send emails to ALL contacts and social platforms that are connected.
If you want to select a more targeted group, let us know in your email reply.

Let us know if you've added any new clients this month so we can be sure to send them the New Client Welcome Series and add them to your ongoing campaigns.

**Key**

- Email (E)
- Social media (S)
- Blog (B)
- FMG automation

| SUNDAY | MONDAY | TUESDAY | WEDNESDAY | THURSDAY | FRIDAY | SATU |
|---|---|---|---|---|---|---|
| 31 Easter | 1 | 2 B: Give Your Children the Gift of Financial Literacy S: April Is National Financial Literacy Month | 3 E: Empower Your Children with Financial Literacy Skills | 4 | 5 Monthly Market Insights S: Financial Friday: Tips for Teaching Children & Teens About Finances | 6 |
| 7 | 8 | 9 | 10 S: National Siblings Day | 11 | | |
| 14 | 15 **Tax Day** S: Tax Day: April 15, 2024 | 16 Video of the Month B: Create a Strategy to Protect Your Wealth with Potential Estate Tax Changes Looming S: National Healthcare Decisions Day: April 16 | 17 E: TCJA - Impact on Estate and Gift Strategies | 18 | | |
| 21 | 22 | 23 S: Motto for April | 24 | 25 | | |

### Blogs

- April 2: Give Your Children the Gift of Financial Literacy
- April 16: Create a Strategy to Protect Your Wealth with Potential Estate Tax Changes Looming

### Emails

- April 3: Empower Your Children with Financial Literacy Skills – COI Version
- April 17: TCJA - Impact on Estate and Gift Strategies – Clients and Prospects
- April 17: TCJA - Impact On Estate And Gift Strategies – COI Version

### Social Posts

- April 2024 DIFM Educational Social Sequence
  - April 2: April Is National Financial Literacy Month
  - April 10: National Siblings Day
  - April 15: Tax Day: April 15, 2024
  - April 16: National Healthcare Decisions Day: April 16
  - April 23: Motto for April - HOPE - Have Only Positive Expectations
- April 2024 DIFM Financial Friday Tips Social Sequence
  - April 5: Financial Friday: Tips for Teaching Children & Teens About Finances
  - April 12: Financial Friday: Social Security Month
  - April 19: Financial Friday: TCJA and The Impact on Estate & Gift Strategies
  - April 26: Financial Friday: Preparing for Homebuying Season

### FMG Automation

- Monthly Market Insights – Social Post and Email: Around the 7th of Each Month
- Video of the Month – Email Only: Third Week of Each Month

### Additional Content Options – these can be used in addition to or swap out with other social posts

**Social Posts**

- April 1: April Fools' Day
- April 2: World Autism Awareness Day
- April 7: World Health Day
- April 8: National Library Week
- April 22: Earth Day
- April 22: Passover
- April 24: Administrative Professionals Day
- April 26: Celebrate Arbor Day: April 26, 2024
- 4 optional timely social posts (social assists) per week

**Optional Email**

- April 29: DIFM Prospect Email re: Customer Experience

### Every Month Add New Clients To:

- New Client Welcome Series
- Center of Influence Campaigns
- Monthly Market Insights
- Birthday

### Don't Forget About...:

- Prospect Email Sequence

View Complete List of All DIFM Blogs Here
View Complete List of Niche/Special Content Here

### Marketing Tip:

- Surprise and delight the tax professionals and CPAs in your network. It's their busiest time of the year and dropping off or sending a food basket would be sure to make an impact. Or try Goldbelly to ship delicious food from anywhere in the country! It's an opportunity to show you're thinking about them that will likely pay dividends down the line!

All content and timelines are subject to your Broker/ Dealer compliance and approval.

Willing to give a testimonial about DIFM? We would love that! Please click here for more information.

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# Advisors ❤️ Love Our "Do It For Me" Program

We got a client because of you guys. They were reading the emails you sent out, they made an appointment, and we are working together - a million dollar client. Just keep doing what you're doing. I'm not on the FMG calls so I don't know what it is, but it's definitely working. ~ *Henry H., March 2024*

Want to learn more?

**Book a time to talk with** us →

**Meet With Us:** https://fmgsuite.com/get-a-demo

**Questions?** Marketing@fmgsuite.com

We're here to help.

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