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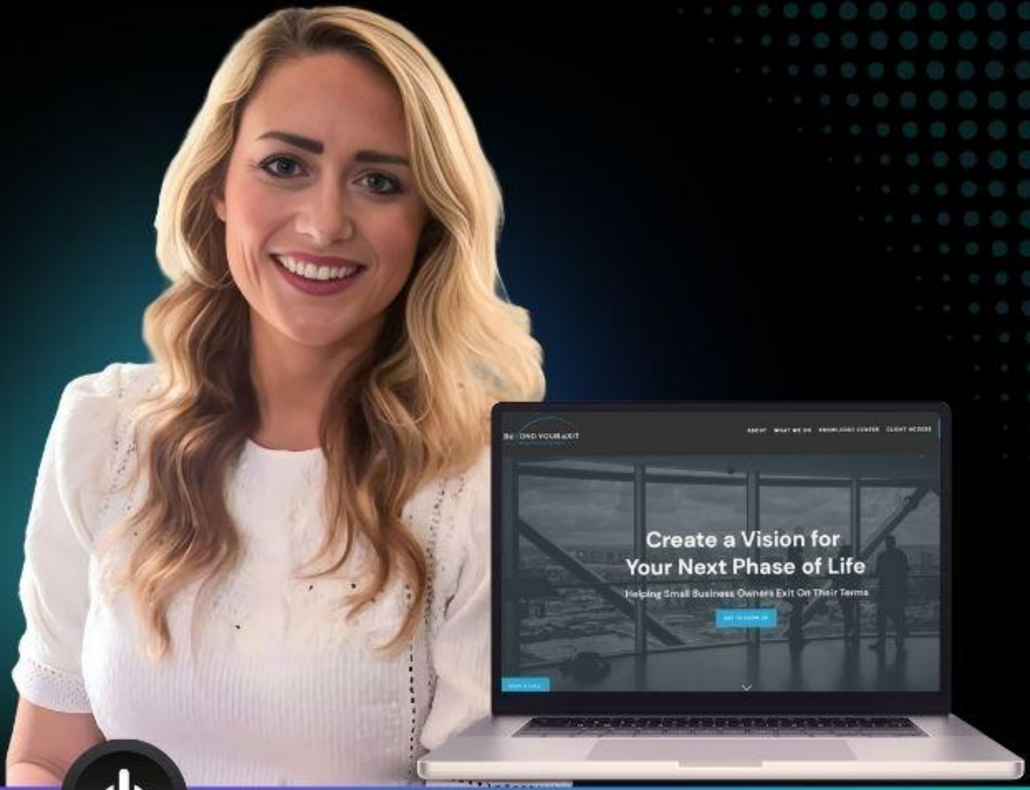
WEBSITE FIXER UPPER SERIES

LIVE WEBINAR

HOW CONFIDENT ARE YOU IN THE STRENGTH OF YOUR WEBSITE?



Wednesday, April 17th, 2024

11 am PT/ 2 pm ET

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

2023 & 2024

#1 in Digital Marketing
T3 Advisor Software Survey 2024

Practice Management Solutions Provider of the Year
Wealth Solutions Report 2024

Executive Leadership Award For Fintech Platforms
ThinkAdvisor Luminaries 2023

2022 & 2023

Best Marketing Automation
WealthManagement Industry Awards 2022

Social Media
WealthManagement Industry Awards 2022-2023

Top in Customer Satisfaction
MarTech Breakthrough Award 2019-2022

Our expertise is showing off yours.

Samantha Russell

Chief Evangelist, FMG

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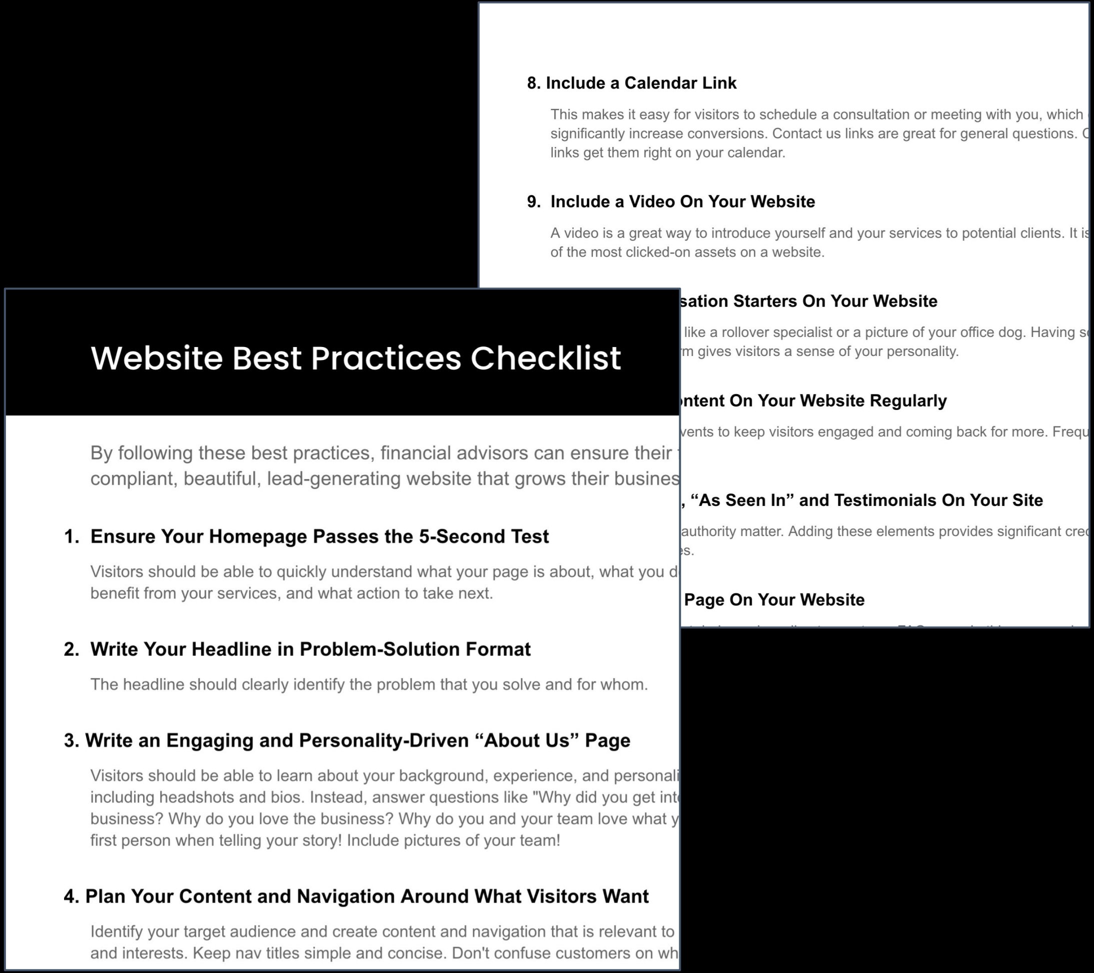
Website Success Checklist ✅

Coming Your Way!

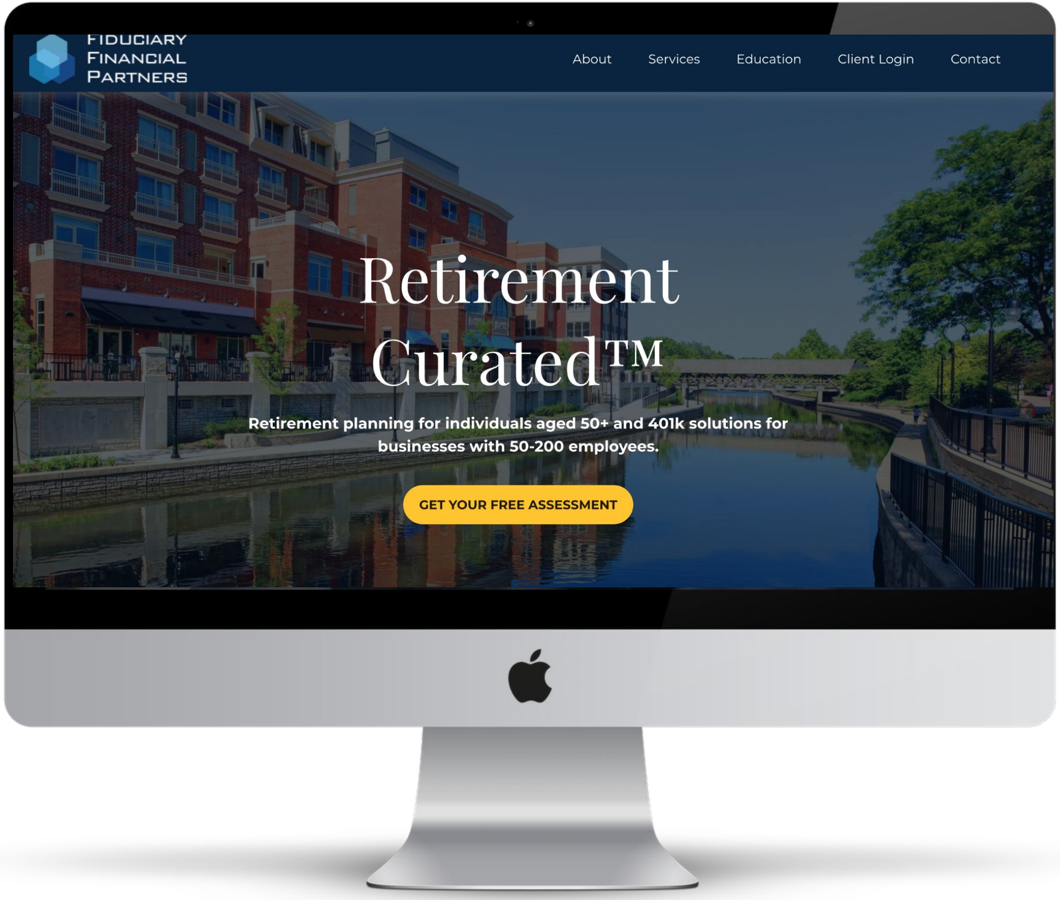


#1

Start with the MOST VISITED page of your site. Your **HOMEPAGE**

Before Sending Leads To Your Site, Ask:

Does My Website Pass The 5 Second Test?



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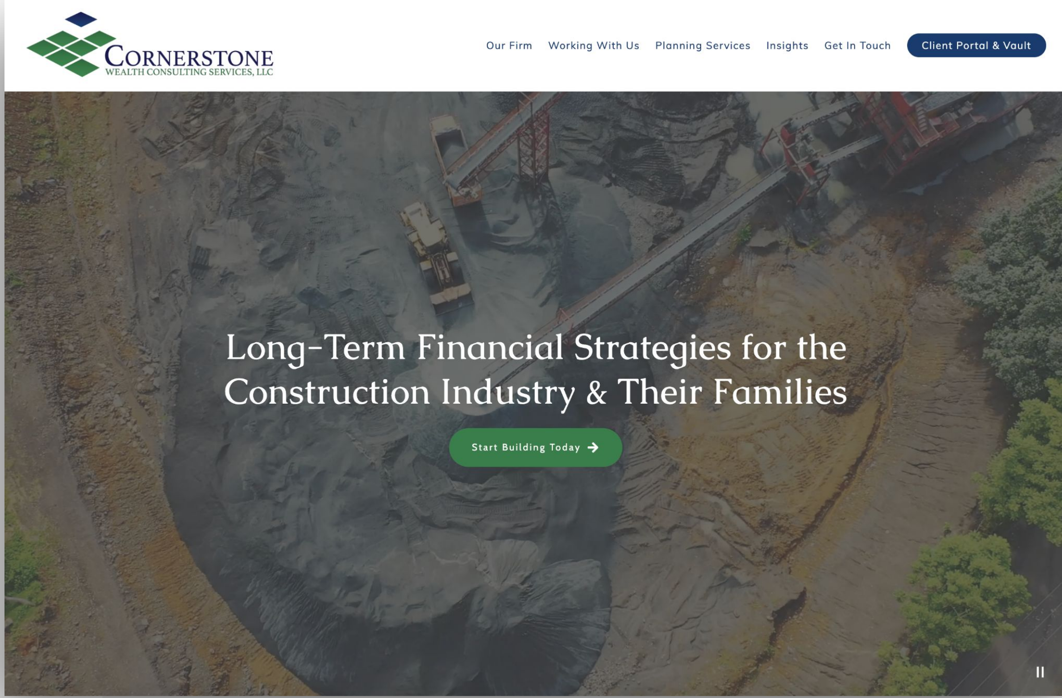
You Have 5 Seconds To Make a First Impression



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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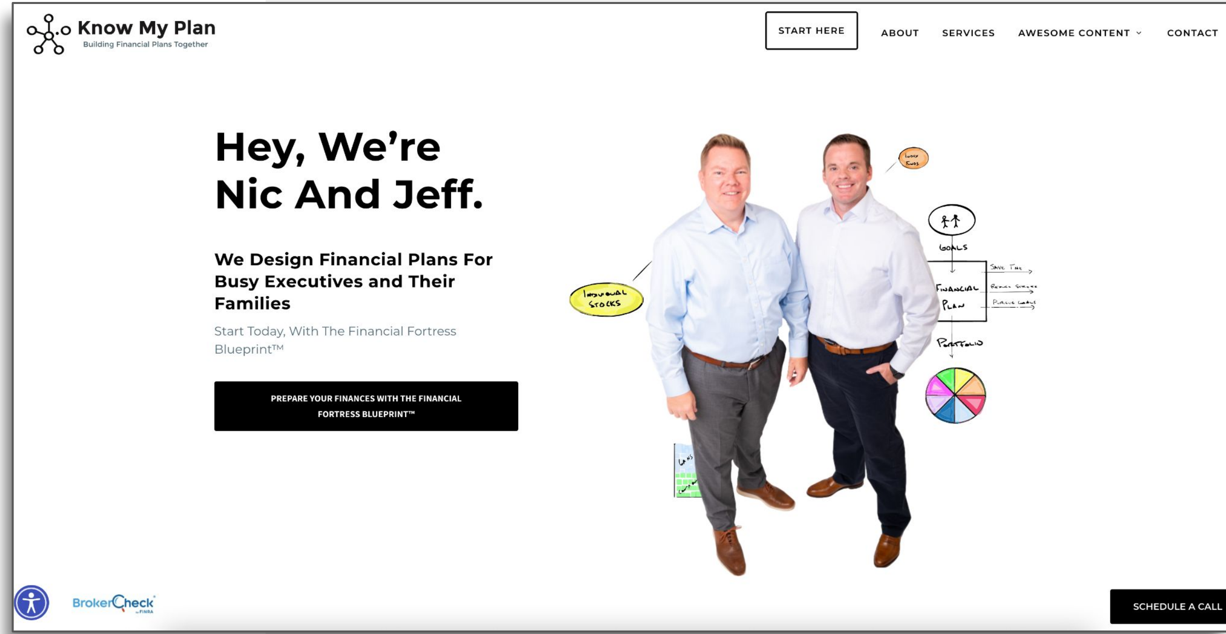
Copy + Image + UX

➡️ **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?

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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

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

✅

#2

Write How People Talk

Our services help you answer the following questions:

How much is my business worth?

How much money will I need to get from the business upon exit to live my desired lifestyle?

What are my exit options and how can I do it without overpaying in taxes?

Am I personally and financially ready to step away from the business?

What do I want "life after business" to look like?

Am I saving enough?

How can I reduce my exposure to risk?

Use the WORDS and PHRASES your clients and prospects would use

Source: https://beyondyourexitwm.com/what-we-do/financial-planning

Serve “Retirees & Pre-Retirees?” Get more specific!

Who We Serve

Have you had your head down, saving diligently for the future but not really knowing exactly what it looks like or what you were saving for? Do you want to be more intentional about accumulating for and living your best life before and into retirement?

If you’re in your late 40’s to early 50’s, let’s establish your plan to get to the next chapter.

Some questions you may have:

- Can I leave the salaried job and start my own venture?
- What are my retirement options?
- When can we enjoy experiences on our bucket list?
- How do we fund college education costs?
- Do we have our risks managed?
- Is our estate plan protecting our children and beneficiaries?

You’re in your late 50’s to 60’s.

We can help answer the following:

- How do we fund retirement activities?
- How do we create a family gathering space with a second home?
- When should I start taking Social Security?
- How do I effectively fund a long-term care event?
- How do I help an aging parent?
- Can I help my adult children?
- What kind of legacy can I leave?

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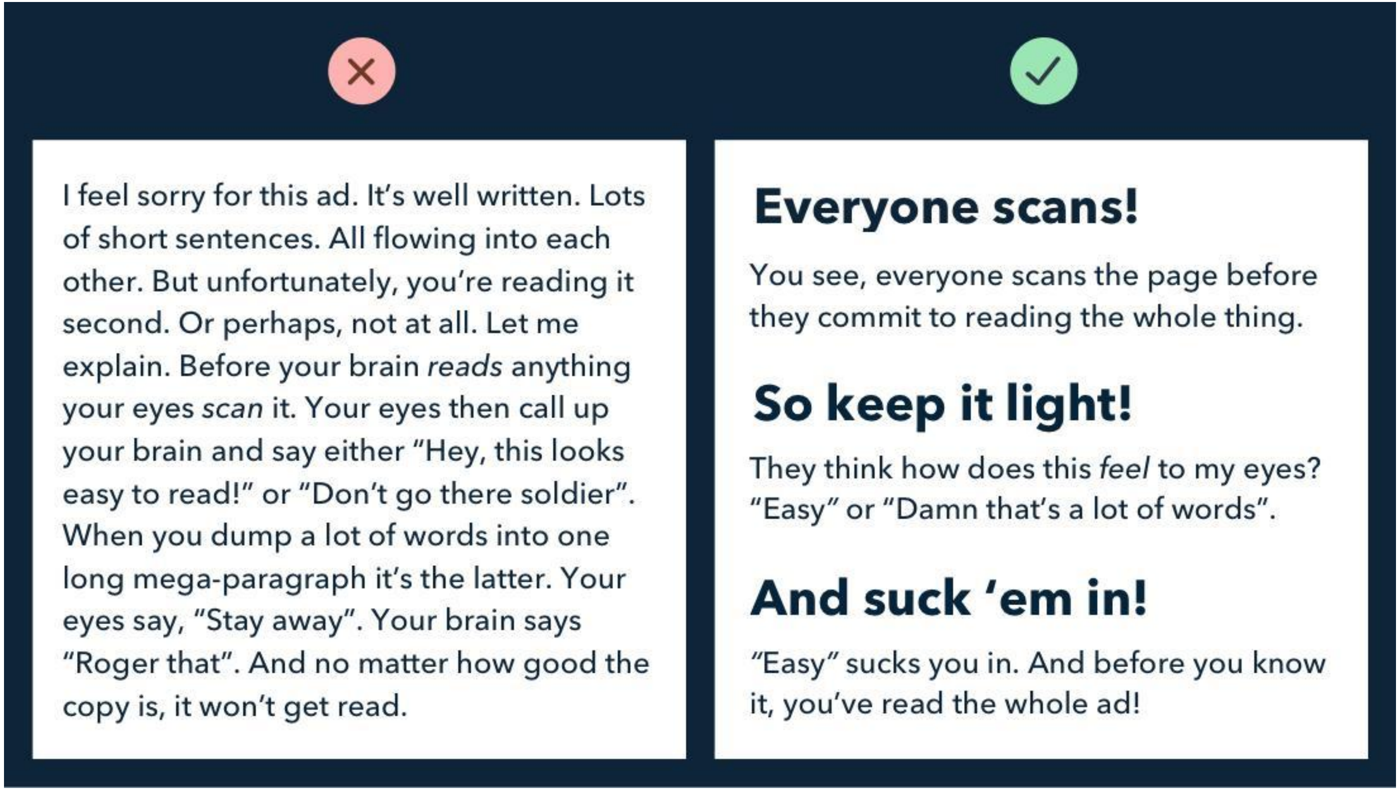
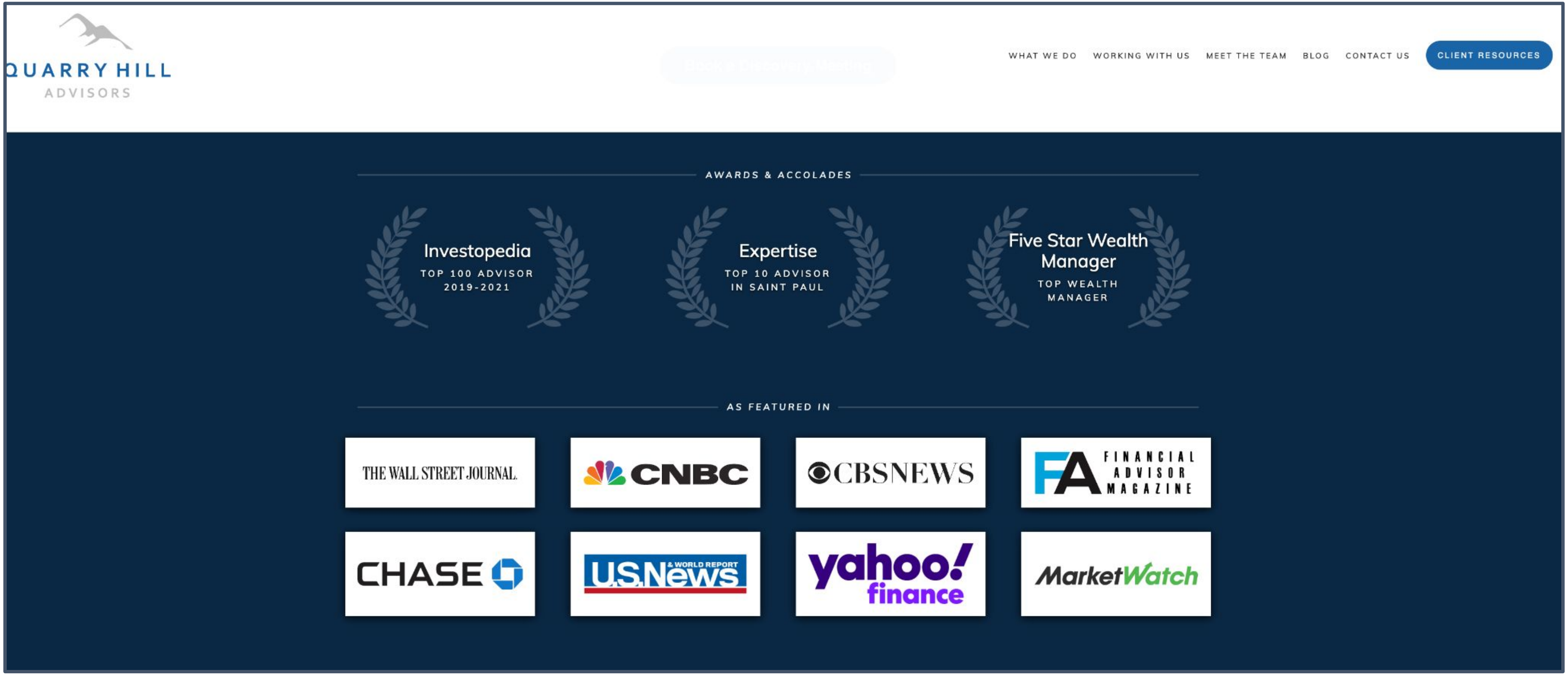
Design: No one reads a website like a book - We scroll and scan.



#3

Don’t Forget The Power of Social Proof



Resource:
https://fmgsuite.com/insights/how-to-use-an-as-featured-in-section-on-your-advisor-website-3-examples/

DRUCKER WEALTH
Financial Planning | Wealth Management

ABOUT US | WHO WE SERVE | WHAT WE DO | RESOURCES | START HERE!

See what our clients are saying and read all of our reviews! ⭐⭐⭐⭐⭐

READ OUR REVIEWS

Meet The Wealth Builder Team

Don’t have testimonials or logos of famous pubs to include?

ADD: Case Studies/Scenarios

Retirement Matters

About | Services | Blog | Contact | Schedule

RETIREMENT

Andrew and Jennifer both come from a prudent, middle-class background and worked at the executive level for most of their careers – Andrew in the start-up biotech industry and Jennifer at AbbVie. They had been taught how to save by their parents, but even that training didn’t quench the nervousness and anxiety they felt being on the doorstep of retirement. While they didn’t have too much time to make any adjustments, they were able to implement a plan that eased their concerns and paved the wave for an enjoyable retirement.

As part of their plan, we:

- Changed their retirement savings strategy so they had a more tax-balanced portfolio in retirement.
- Reviewed their current insurance coverage so they understood how to transition into retirement without leaving gaps in coverage or incurring significantly higher premiums.
- Examined their current spending to understand what lifestyle their assets would support.
- Explored how they would want to work in “encore careers” and how to balance this with having more free time to explore their passions.
- Discussed the approaches they could take with their investments given the fact they may not need all the money, and how they may want to manage these funds.
- Made a “bucket-list” of things they wanted to achieve in retirement and understood if they could afford all those things.
- Discussed potential changes to their estate plan and account titling, as they wanted to gift some of their money to charity and grandchildren.

#4

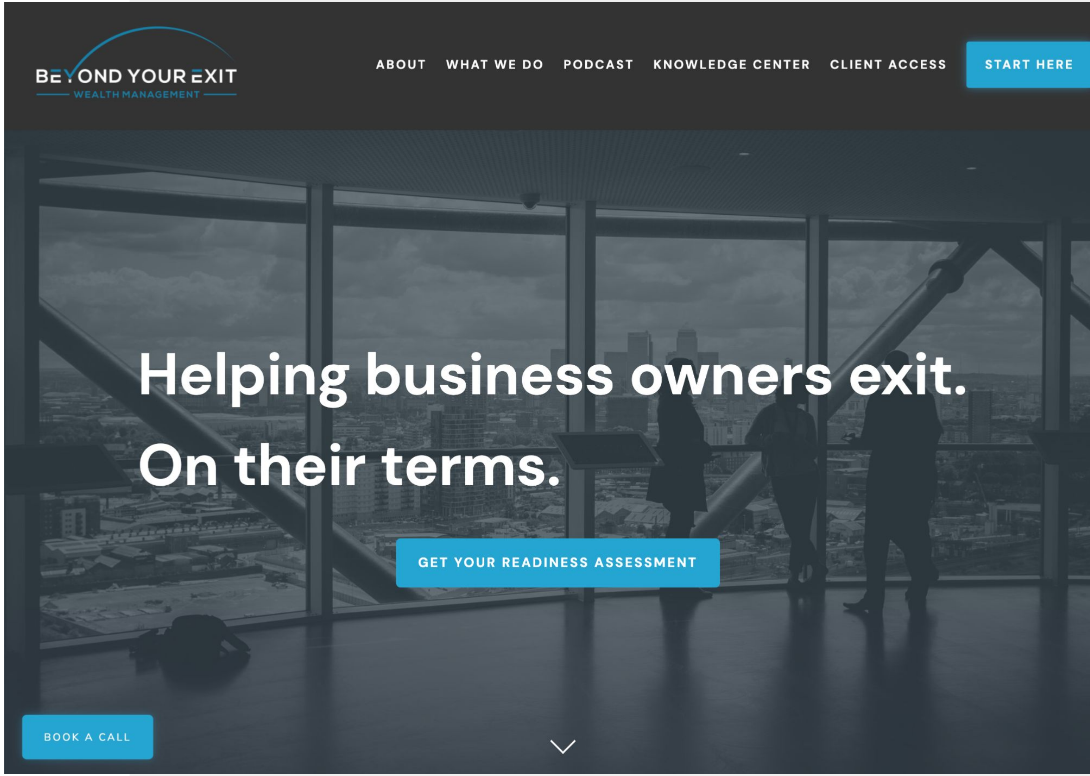
The CTA is the KEY

97% of website visitors do NOT convert!

Calls to Action

➡️ **Primary:** For those ready to move forward

➡️ **Secondary:** For those not yet ready to meet with you



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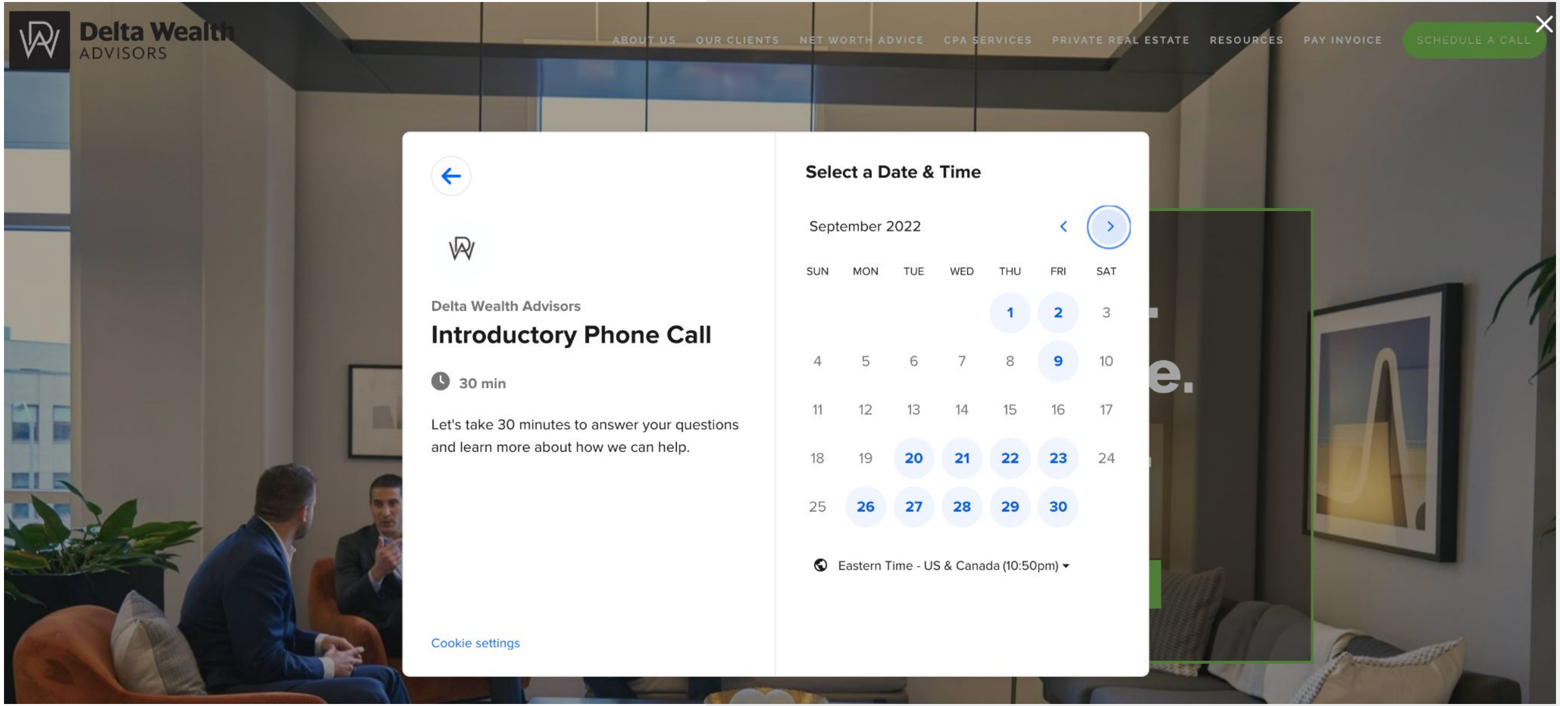
For Primary - Use Online Calendar Widget



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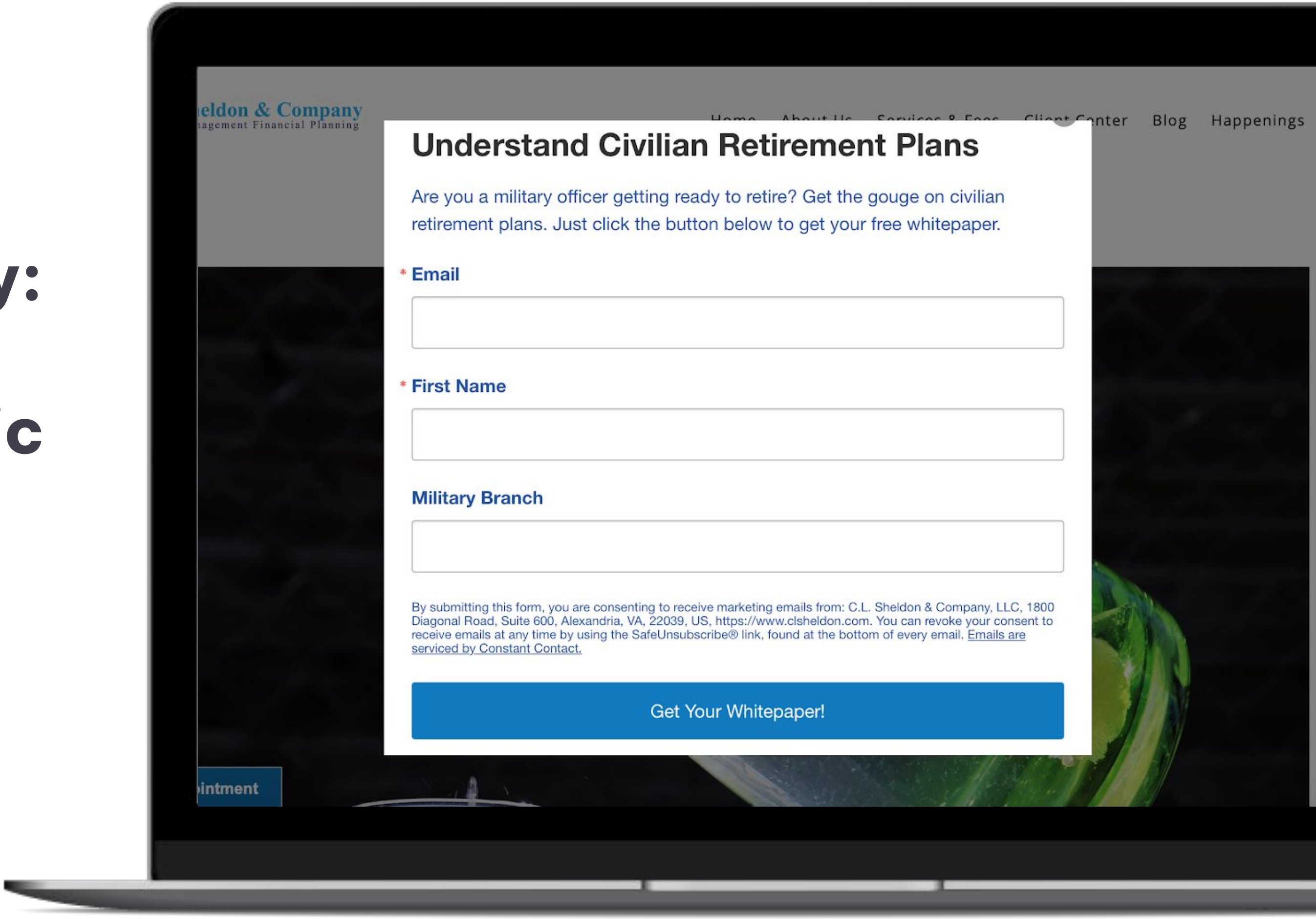
For Secondary: Make CTAs SUPER specific to your audience



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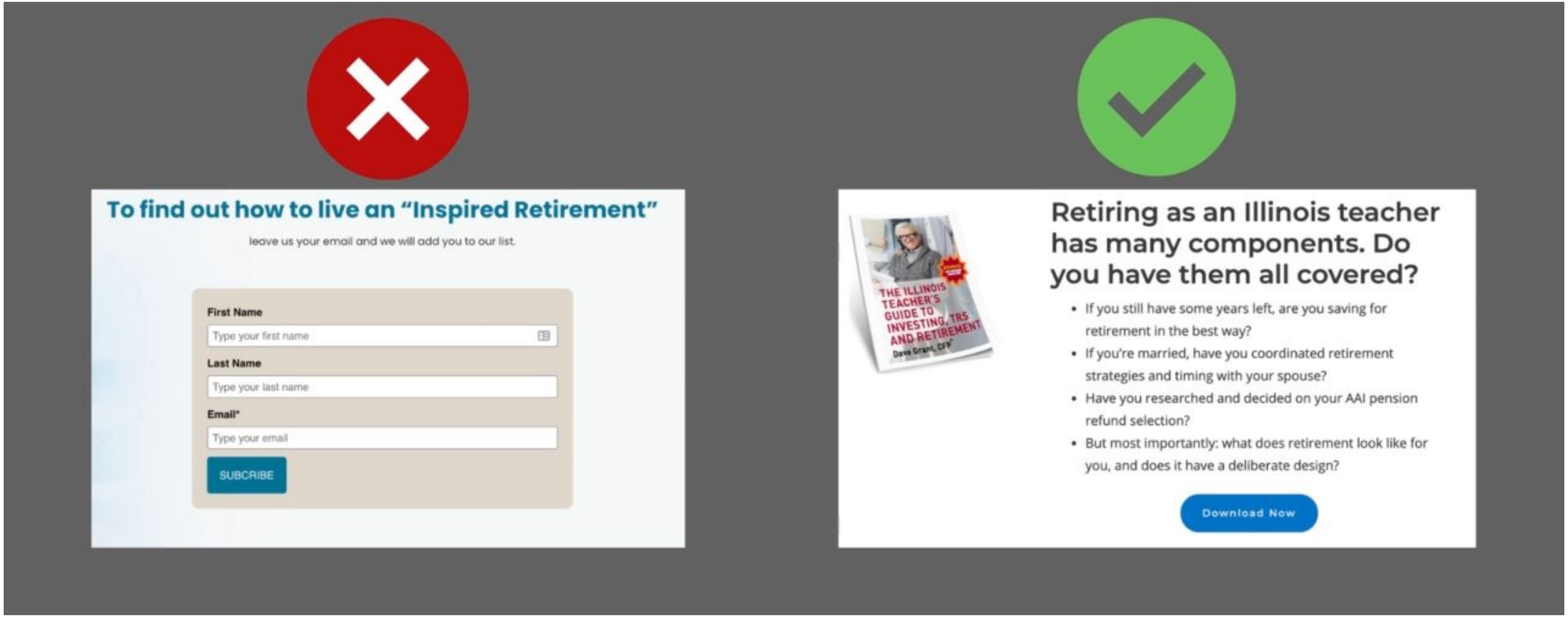

➡️ Explain what someone will learn, or how they'll benefit from taking action

➡️ Be specific and explicit! An image of what they'll get can go a long way too

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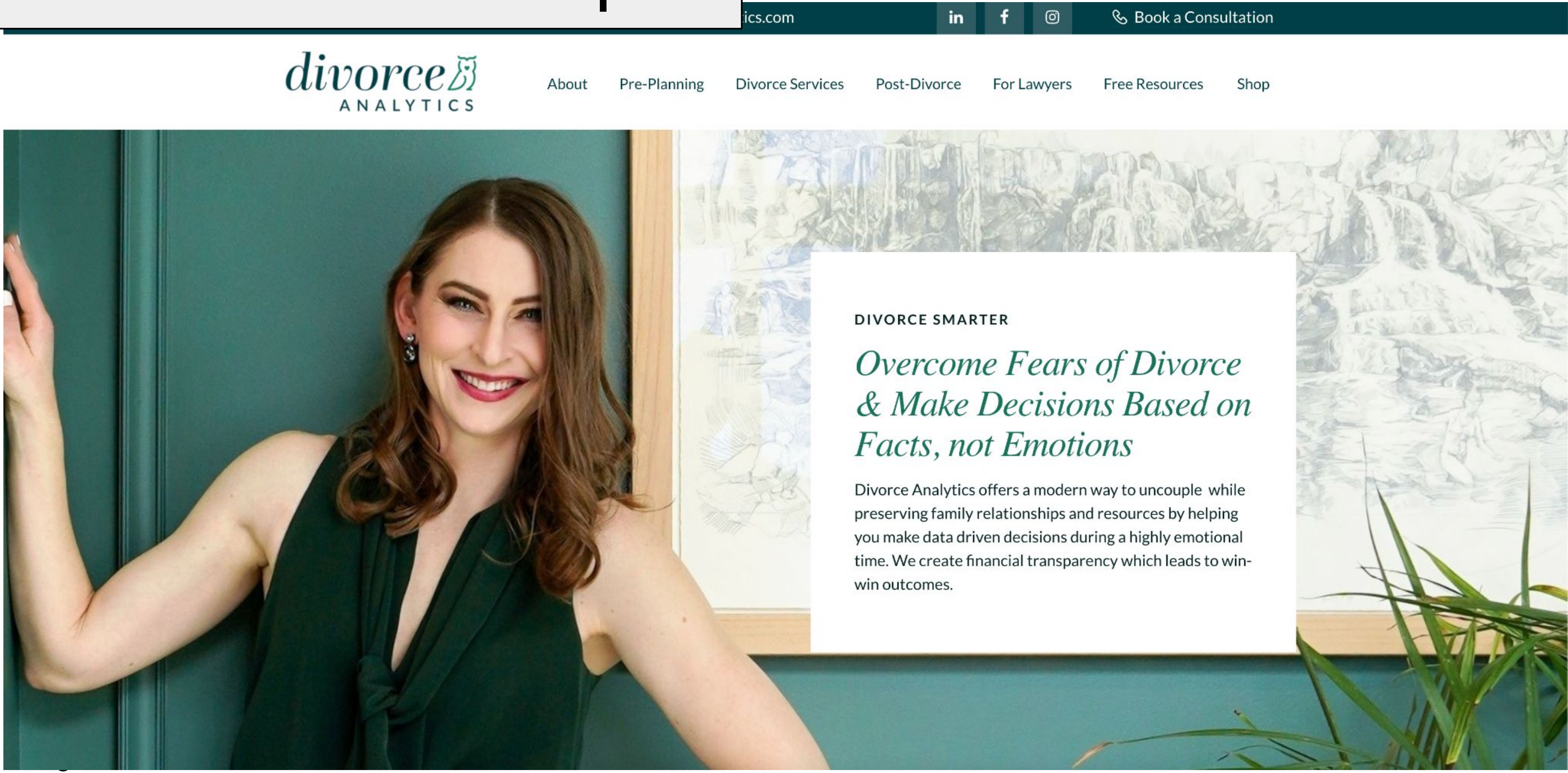
#5

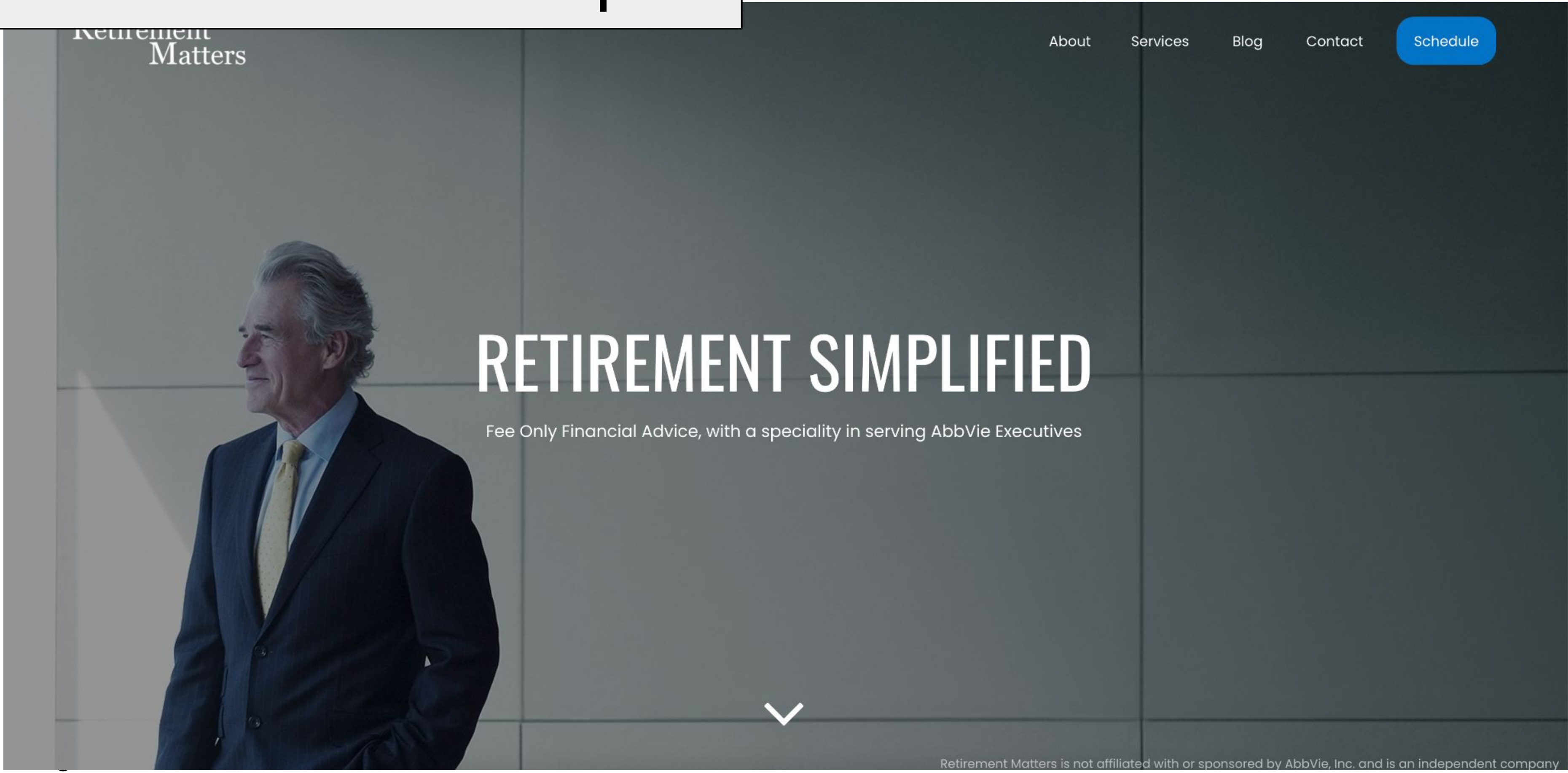
Great Website Examples from real FMG Customers

Great Website Examples



Great Website Examples

Great Website Examples



Website Fixer Upper

Need Website Help?

Premium Websites with FMG

Easy to build. Easy to manage. Guaranteed to wow

SEO Tools

Our built-in search engine optimization tools allow you to easily optimize your website to drive more organic traffic.

Lead Generation

Easily add compelling quizzes and guides to your site that prospects can download in exchange for their contact information.

One-Click Compliance

Every website update is automatically submitted to your compliance. Once approved, those changes publish immediately.

Copywriting

Know what you want your website to say but need help writing it? Our expert copywriters will take your thoughts and turn them into compelling copy.

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*

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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	
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	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		

Do It For Me Marketing Program

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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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.

Questions?

Samantha Russell

Chief Evangelist, FMG

Let's Connect on Social!

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srussell@fmgsuite.com