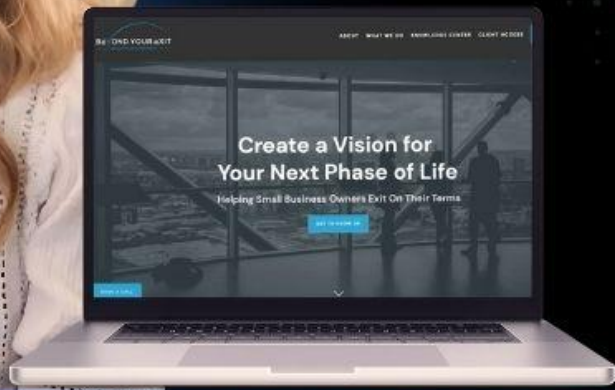




WEBSITE FIXER UPPER SERIES

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

Connect

 @SamanthaTwenty

 /samanthacrussell

 srussell@fmgsuite.com



Susan Theder

Chief Marketing and Experience Officer, FMG

 @stheder

 /susantheder

 stheder@fmgsuite.com

Website Success Checklist

Coming Your Way!

Website Best Practices Checklist

By following these best practices, financial advisors can ensure their compliant, beautiful, lead-generating website that grows their business.

1. Ensure Your Homepage Passes the 5-Second Test

Visitors should be able to quickly understand what your page is about, what you do, and how they can benefit from your services, and what action to take next.

2. Write Your Headline in Problem-Solution Format

The headline should clearly identify the problem that you solve and for whom.

3. Write an Engaging and Personality-Driven “About Us” Page

Visitors should be able to learn about your background, experience, and personality, including headshots and bios. Instead, answer questions like “Why did you get into this business? Why do you love the business? Why do you and your team love what you do?” first person when telling your story! Include pictures of your team!

4. Plan Your Content and Navigation Around What Visitors Want

Identify your target audience and create content and navigation that is relevant to them and their interests. Keep nav titles simple and concise. Don't confuse customers on what

8. Include a Calendar Link

This makes it easy for visitors to schedule a consultation or meeting with you, which significantly increase conversions. Contact us links are great for general questions. Contact us links get them right on your calendar.

9. Include a Video On Your Website

A video is a great way to introduce yourself and your services to potential clients. It is one of the most clicked-on assets on a website.

10. Add a Photo of Your Consultation Starters On Your Website

Just like a rollover specialist or a picture of your office dog. Having a photo of your team gives visitors a sense of your personality.

11. Update Your Content On Your Website Regularly

Regular updates keep visitors engaged and coming back for more. Frequent updates

12. Add “As Seen In” and Testimonials On Your Site

Testimonials and “As Seen In” logos are a great way to establish your authority matter. Adding these elements provides significant credibility and can increase conversions.

13. Add a “Contact Us” Page On Your Website

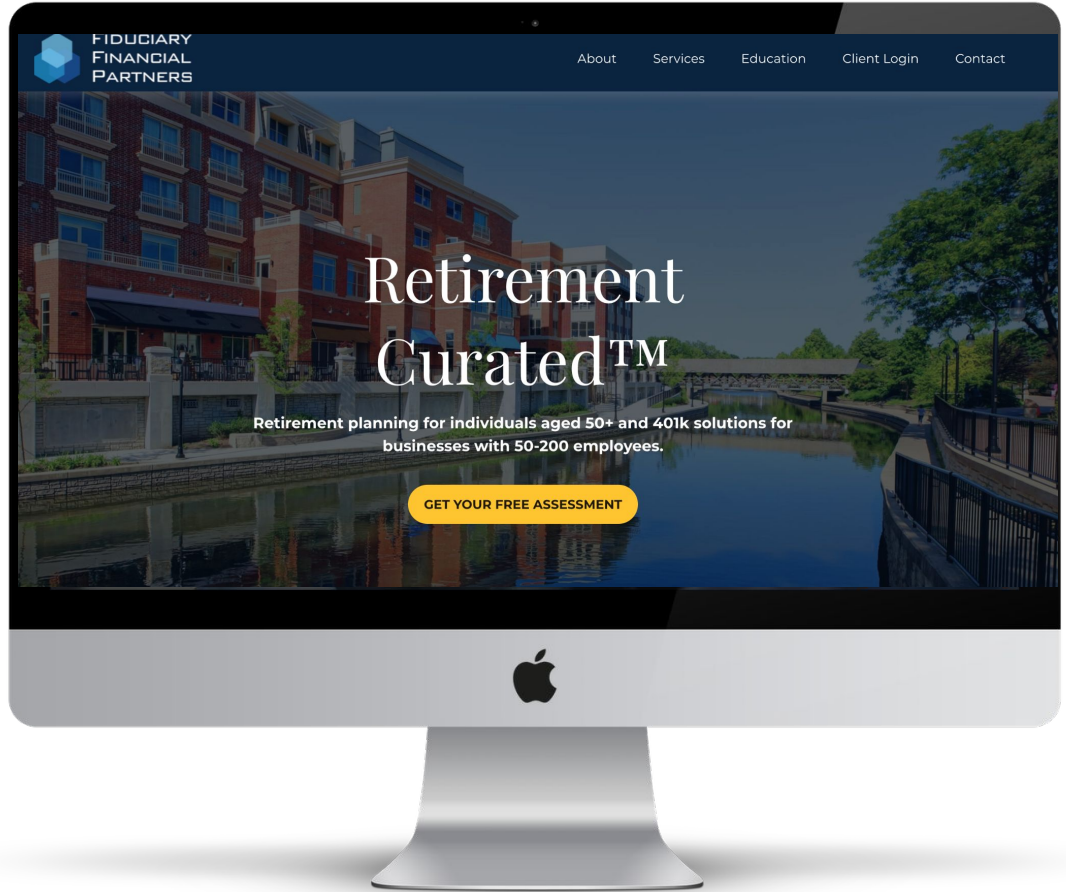
#1

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?**

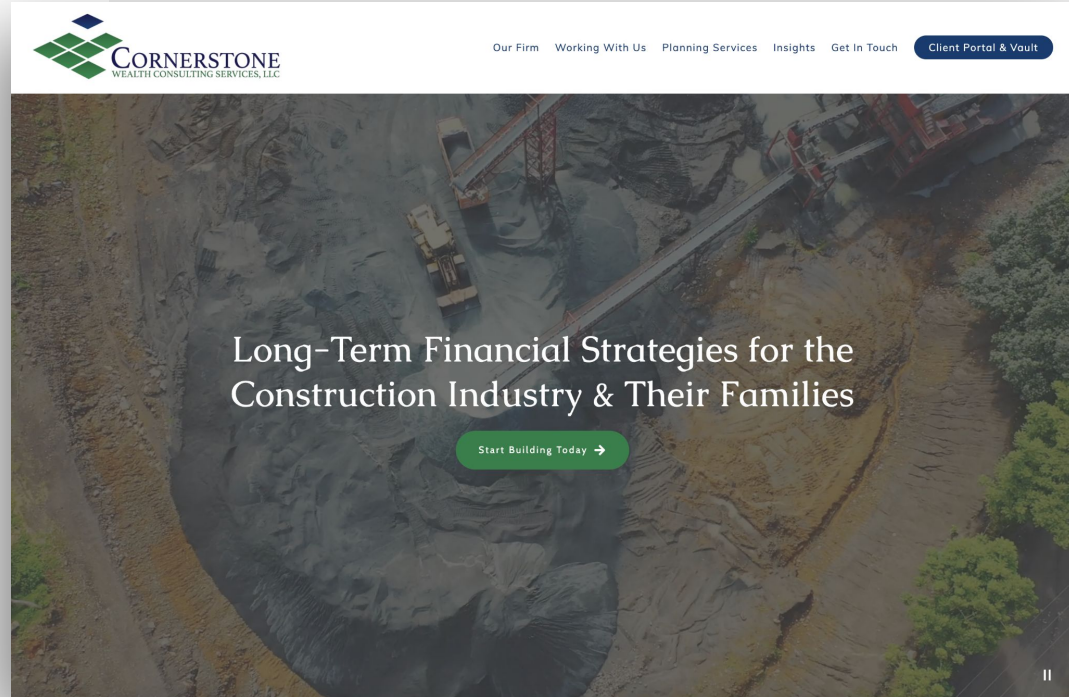
fmg



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?



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?

The screenshot shows the homepage of 'Know My Plan', a financial planning service. The header includes the company logo and tagline 'Building Financial Plans Together', along with navigation links: 'START HERE' (highlighted with a box), 'ABOUT', 'SERVICES', 'AWESOME CONTENT', and 'CONTACT'. The main content area features the headline 'Hey, We're Nic And Jeff.' followed by the sub-headline 'We Design Financial Plans For Busy Executives and Their Families'. Below this is the text 'Start Today, With The Financial Fortress Blueprint™' and a prominent black button with white text: 'PREPARE YOUR FINANCES WITH THE FINANCIAL FORTRESS BLUEPRINT™'. To the right of the text is a photograph of two men, Nic and Jeff, standing side-by-side. Hand-drawn annotations are overlaid on the image: a yellow oval pointing to Nic says 'Large Build Stock', a yellow oval pointing to Jeff says 'Lower Risk', and a diagram to the right of Jeff shows a flow from 'lookHS' to 'Financial Plan' to 'Portfolio', with a pie chart below it. The footer contains the 'BrokerCheck' logo and a 'SCHEDULE A CALL' button.

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

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

An advertisement for 'Retirement Curated' featuring a background image of a modern brick building with a river in the foreground. The text is overlaid on the image.

Retirement Curated™

Retirement planning for individuals aged 50+ and 401k solutions for businesses with 50-200 employees.

GET YOUR FREE ASSESSMENT

#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

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?

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



I feel sorry for this ad. It's well written. Lots of short sentences. All flowing into each other. But unfortunately, you're reading it second. Or perhaps, not at all. Let me explain. Before your brain *reads* anything your eyes *scan* it. Your eyes then call up your brain and say either "Hey, this looks easy to read!" or "Don't go there soldier". When you dump a lot of words into one long mega-paragraph it's the latter. Your eyes say, "Stay away". Your brain says "Roger that". And no matter how good the copy is, it won't get read.



Everyone scans!

You see, everyone scans the page before they commit to reading the whole thing.

So keep it light!

They think how does this *feel* to my eyes? "Easy" or "Damn that's a lot of words".

And suck 'em in!

"Easy" sucks you in. And before you know it, you've read the whole ad!

#3

Don't Forget The Power of Social Proof

AWARDS & ACCOLADES



AS FEATURED IN



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

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 way 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

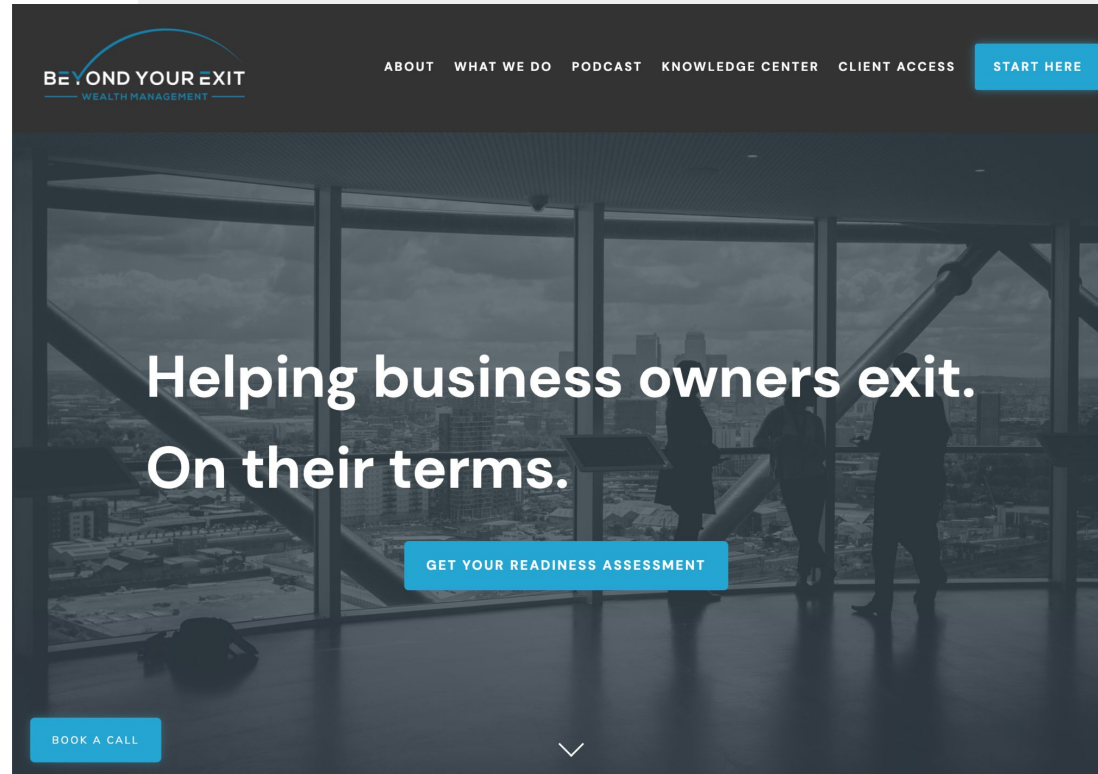
The CTA is the KEY

**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



For Primary - Use Online Calendar Widget

The screenshot shows the Delta Wealth Advisors website with a booking widget for an 'Introductory Phone Call'. The widget is overlaid on a background image of two men in business suits sitting on a couch in a modern office setting. The website header includes the Delta Wealth Advisors logo and navigation links: ABOUT US, OUR CLIENTS, NET WORTH ADVICE, CPA SERVICES, PRIVATE REAL ESTATE, RESOURCES, PAY INVOICE, and a green 'SCHEDULE A CALL' button with a close icon (X).

Delta Wealth Advisors
Introductory Phone Call
30 min
Let's take 30 minutes to answer your questions and learn more about how we can help.

Select a Date & Time
September 2022

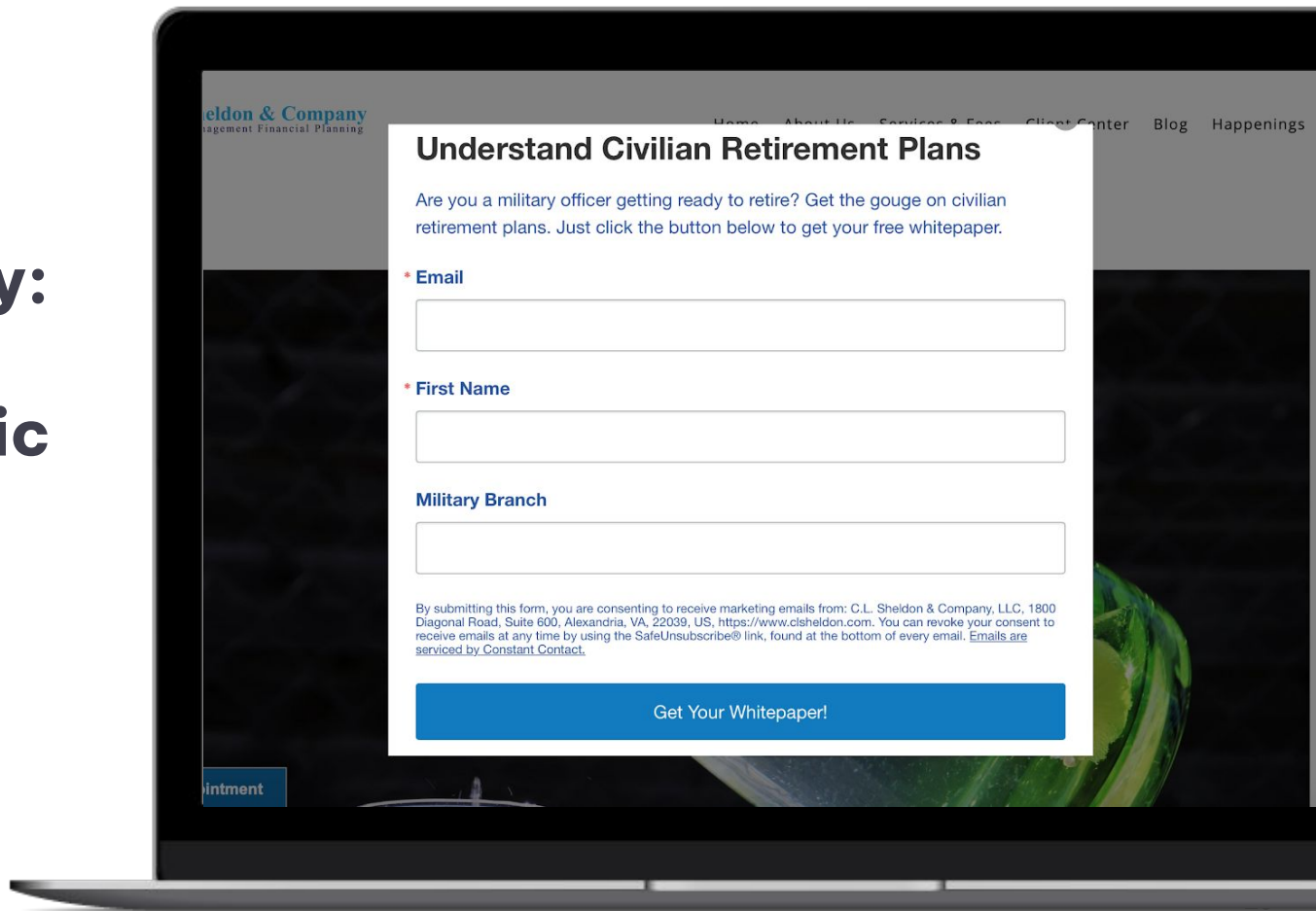
SUN	MON	TUE	WED	THU	FRI	SAT
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

Eastern Time - US & Canada (10:50pm) ▼

[Cookie settings](#)

**For Secondary:
Make CTAs
SUPER specific
to your
audience**

fmg





To find out how to live an "Inspired Retirement"

leave us your email and we will add you to our list.

First Name
Type your first name

Last Name
Type your last name

Email*
Type your email

[SUBSCRIBE](#)



Retiring as an Illinois teacher has many components. Do you have them all covered?



- If you still have some years left, are you saving for retirement in the best way?
- If you're married, have you coordinated retirement strategies and timing with your spouse?
- Have you researched and decided on your AAI pension refund selection?
- But most importantly: what does retirement look like for you, and does it have a deliberate design?

[Download Now](#)

- 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

#5

Great Website Examples from real FMG
Customers

Great Website Examples

ics.com

in

f

@

📞 Book a Consultation



About

Pre-Planning

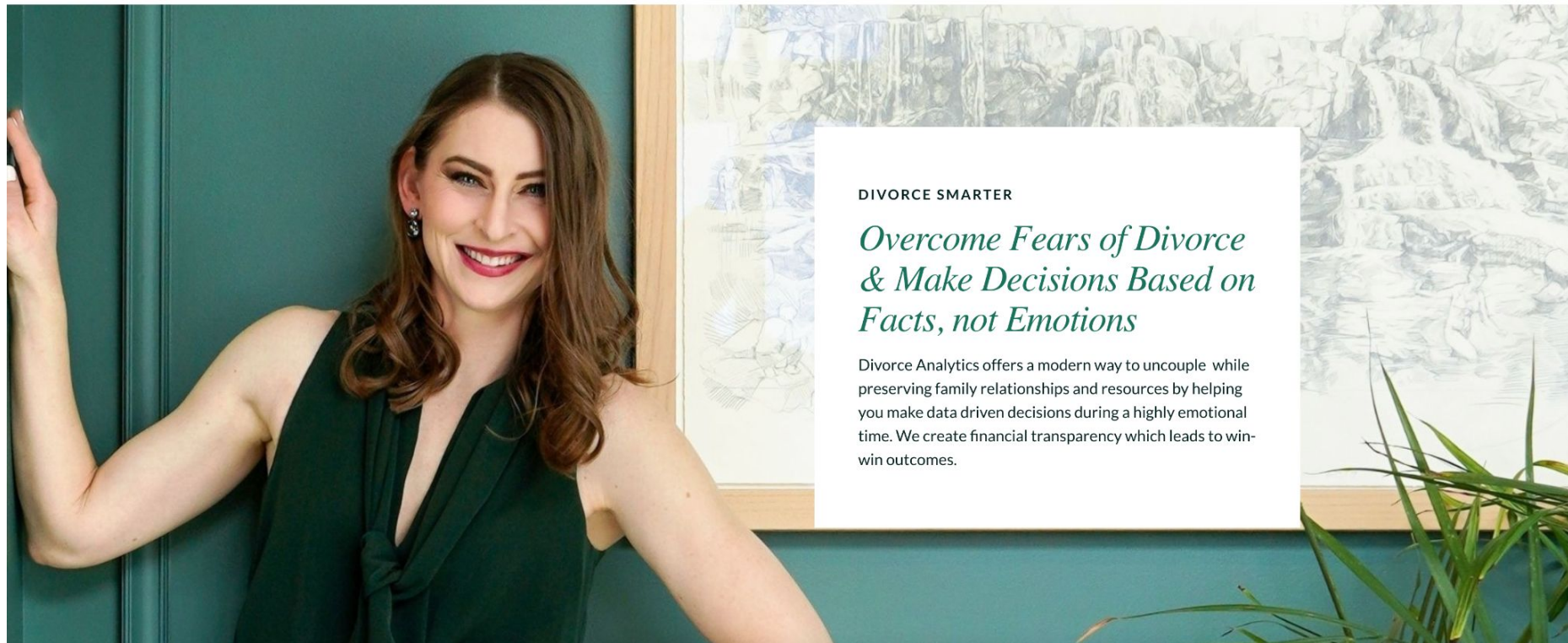
Divorce Services

Post-Divorce

For Lawyers

Free Resources

Shop



DIVORCE SMARTER

Overcome Fears of Divorce & Make Decisions Based on Facts, not Emotions

Divorce Analytics offers a modern way to uncouple while preserving family relationships and resources by helping you make data driven decisions during a highly emotional time. We create financial transparency which leads to win-win outcomes.

Great Website Examples



[ABOUT](#) [SERVICES & FEES](#) [PODCAST](#) [KNOWLEDGE CENTER](#) [HVAC](#)

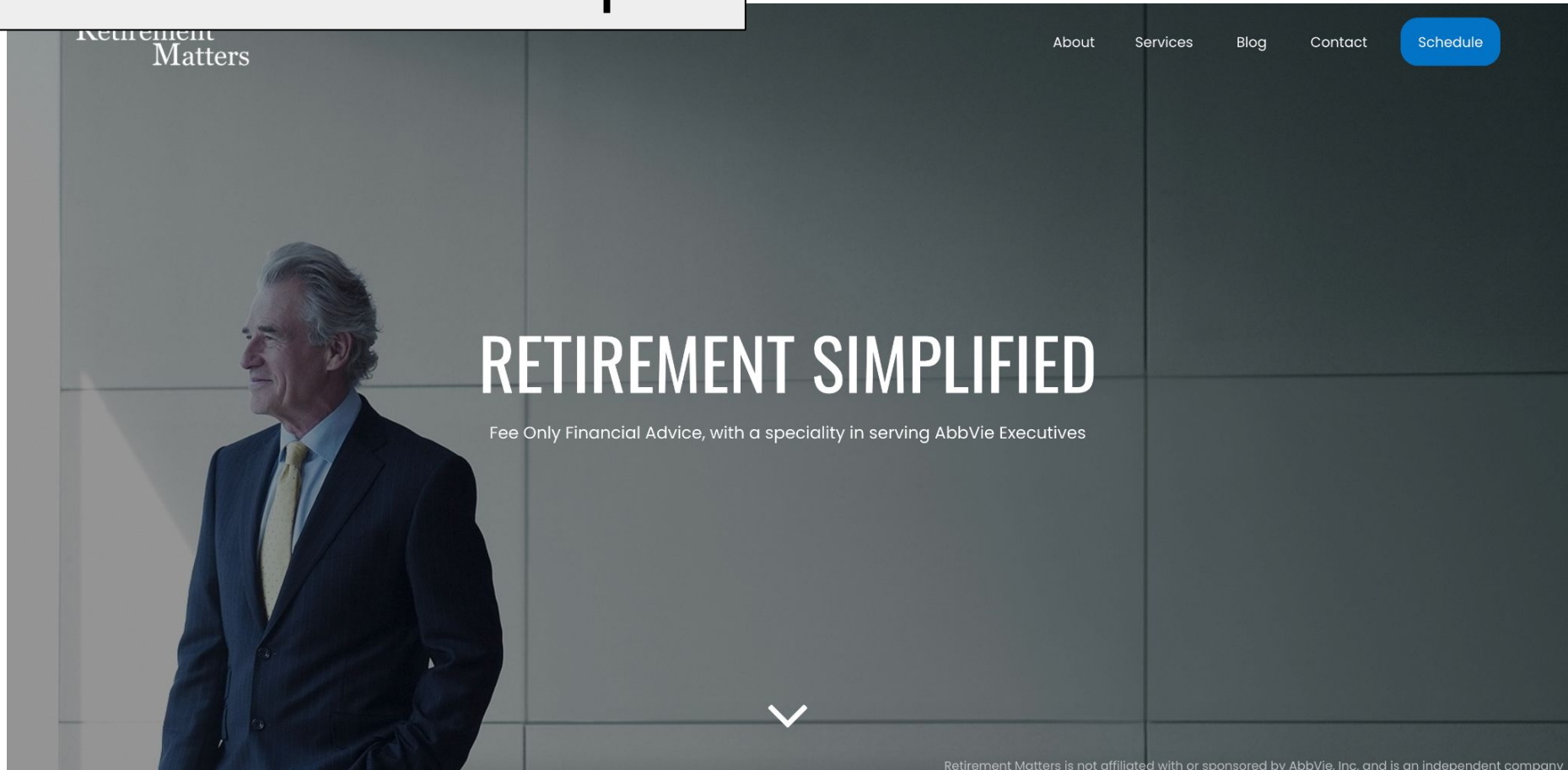
[MAKE A PLAN](#)

Financial Planning For Owners Navigating a Business Transition.

Optimize Your Personal Finances and Business for Freedom



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*



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

Do It For Me Marketing Program

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
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.



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!

 @SamanthaTwenty

 /samanthacrussell

 srussell@fmgsuite.com