Is Your Website Using These Best Practices? A Checklist for Financial Advisors

Your website gives you the same amount of marketing real estate to vie for a potential client's attention as the websites of any financial giant. It is debatably your most valuable brand asset. Most of your prospects will never walk through your office front door, but every one of them will visit your website, so it's critical to make it count. This article provides a checklist of best practices that can help ensure you create an impressive first impression!

1. Follow the 5-Second Rule

Just over half of website visitors spend less than 15 seconds on a page before leaving. To keep visitors around, your homepage needs to provide enough information to help visitors self-qualify as quickly as possible.

That's where the 5-second rule comes in. It's a quick test to see how effective your homepage is. Here's how you can do it:

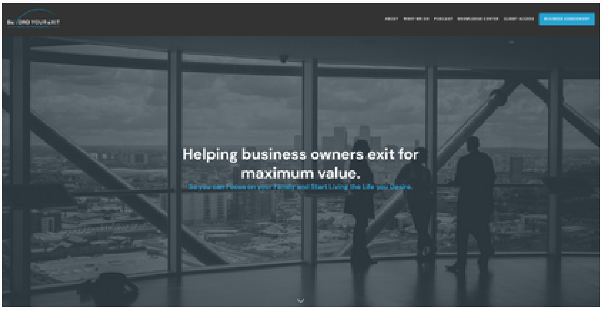
- Navigate to your website's homepage
- Without scrolling or clicking, give yourself 5 seconds to take everything in
- Then, see how many of the following questions you can answer
    - Who benefits from your services?
    - What makes your firm different from others?
    - What's your visitor's next step?

If your homepage can't answer these questions within 5 seconds, then you should perform some edits.

What does this look like?
The majority of the 5-second rule's questions can be answered by your hero message and CTAs alone. So start there when you begin editing.

Be as specific as possible without overwriting. Show who you work with and what makes you different, then use other elements to support this message.

Beyond Your Exit's website provides a great example, opening with a specific hero message and clarifying it in its subheading:



2. Design for First-Time Visitors

The goal of your site is to attract and convert leads. Therefore, it should be friendly to current clients but designed for first-time visitors.

To edit your site for first-time visitors, ask the following:

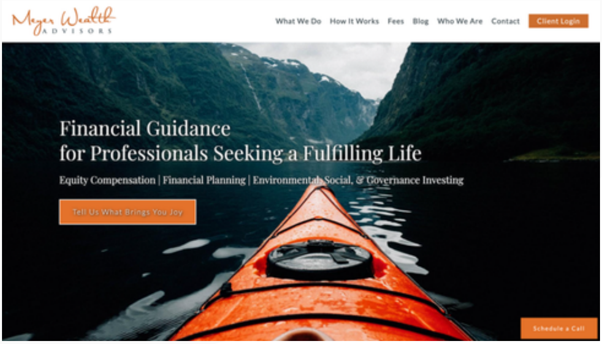
- Is your website easy to navigate? Is your menu clear and not overly complex?
- How are you showcasing your expertise? Do you have a blog or newsletter?
- Can visitors locate and understand your fee structure?
- Are your services clearly defined and organized?
- Do you have an “About” page providing a background for your firm?
- How can visitors contact you? Is this information easy to find?

What does this look like?

Starting with your menu is the best place to begin, as it will often help you organize where your other information should go.

And as a bonus tip, consider including two CTAs on your homepage – one for visitors who are ready to contact you and another for those who want to learn more.

The Meyer Wealth Advisors site is a great example of these ideas in action, offering a clear menu and two CTAs to drive visitor engagement.



3. Always Provide a Fees Page

We often assume a service is more expensive when it doesn’t come with a price tag. So why do the same on your website?

A fees page gives visitors expectations. It shows them exactly what they’re getting for their money and can save time for you and your team.

When crafting your fees page, consider your audience. Work with retirees or pre-retirees? A more traditional AUM approach might be best. Are millennials your ideal audience? Consider a subscription or one-time fee structure.

What does this look like?

The fee structure you choose doesn't need to be mutually exclusive. The key is to consider your audience and use what works, as multiple options can help you attract different clients.

As a firm focused on providing services to retirees and pre-retirees, the Green Mountain Planning Pricing page is a great example of a multi-option fees page in action:

4. Lay a Foundation for SEO

To get the most out of your website, you'll want to make sure it's searchable. The best way to do that is to invest in SEO.

However, SEO is a complex topic. So to get the most out of this checklist, here are a few actionable items to help improve your site's searchability.

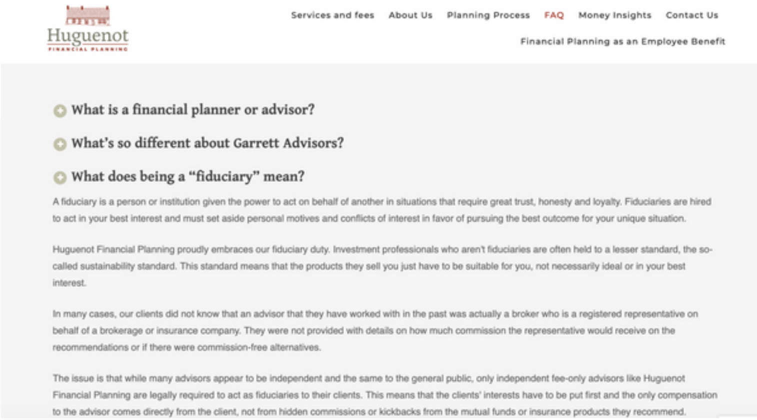
- Create an FAQ page: An FAQ page gives you the space to answer common questions for your firm. And, if someone searches that same question in a search engine, there is a chance your site could appear in the results. Be sure to make these questions highly specific to your firm.
- Verify Your Google My Business: Google My Business allows you to verify and display your business information within a Google search. This gives searchers a snapshot of your website, contact information, and more. Plus, a verified Google My Business with positive reviews is a contributing factor in search ranking.
- Start a Blog: Blogging is one of the most powerful SEO strategies you can invest in. Think of it like your FAQ page but with more information.
- Be Active on Social Media: Social media doesn't directly affect SEO. But, it does attract site traffic and provide an outlet for blog content, both of which can improve SEO.

What does this look like?

Whenever you're creating something for SEO, be sure to search the terms you're using to see what search engines provide.

This will give you context into the search intent and provide possible questions related to your keywords. These questions can then be used directly in your other content to help increase ranking.

For example, the Huguenot Financial Planning site uses a mix of common and specific firm-related questions to create a comprehensive FAQ page:



5. Don't Forget CTAs

Your calls to action are reminders for your readers to contact you. But in many cases, advisors are inclined to include CTAs at the bottom of their page.

Instead, provide relevant calls to action throughout your content and in key locations on your site, including:

- Your "About" page
- Blog articles
- Testimonials page (if approved for use)
- Top performing pages
- Homepage

You could even include a CTA that follows users from page to page.

What does this look like?

A good rule of thumb is to include a CTA whenever new or alternative information is introduced – you never know what will catch a visitor's eye.

For example, following CTA best practices, the Oswego Wealth Management site uses two CTAs on its homepage, along with CTA to follow visitors between pages.

Check All the Boxes

Your website is your most valuable digital asset. And when used correctly, it can help you attract more leads and grow your business.

And though there's always more to learn, by following this list, you'll be headed in the right direction. So, whether you're creating your first site, or editing your current one, be sure to keep these tips in mind.

Ready to Talk Marketing?

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