

fmg

The Exact AI Framework Driving Advisor Growth

Wednesday, 7/16 at 11 am PT | 2 pm ET

HAPPENING **LIVE!**



Giveaway Coming Soon:

AI Guide 



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



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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01

How to use AI to Help You Create Hyper-Personalized Content

Agenda

1

How to Use AI To Help
You **Create**
Hyper-Personalized
Content

2

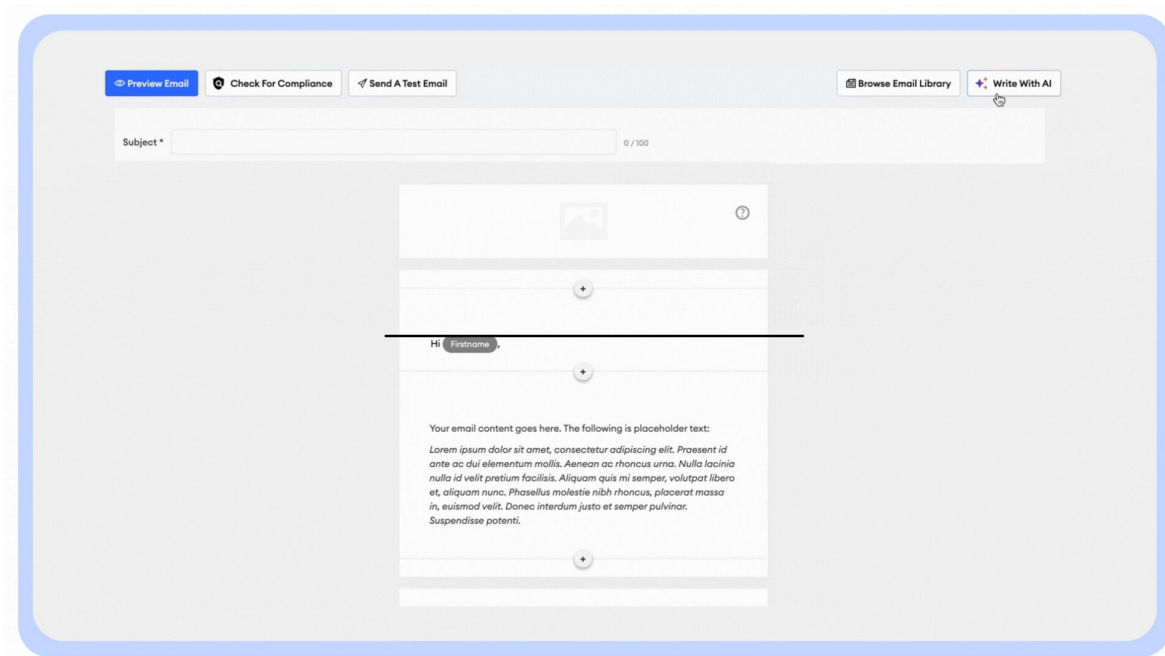
How to Get Chat GPT
& Other **AI Tools** to
Recommend Your
Business

3

How **FMG's New AI**
tools and features
make it easy to do both

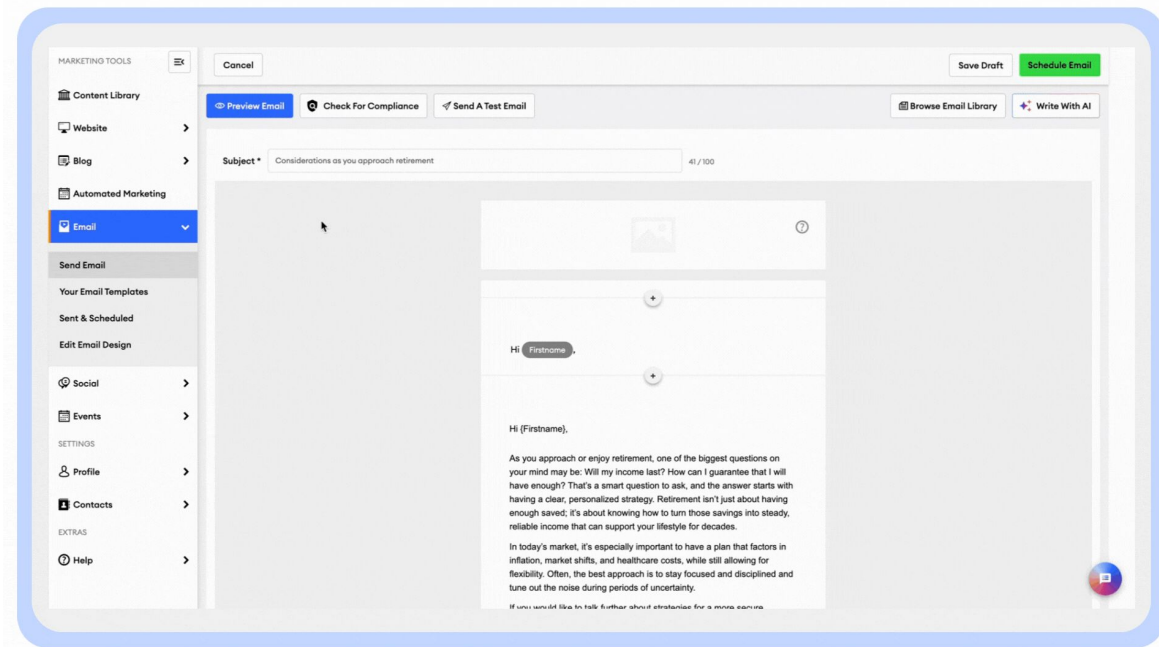
Use AI to help you
write content more
efficiently and
effectively

FMG's MUSE for
social and email



**Use AI to make
content submission
for compliance a
breeze**

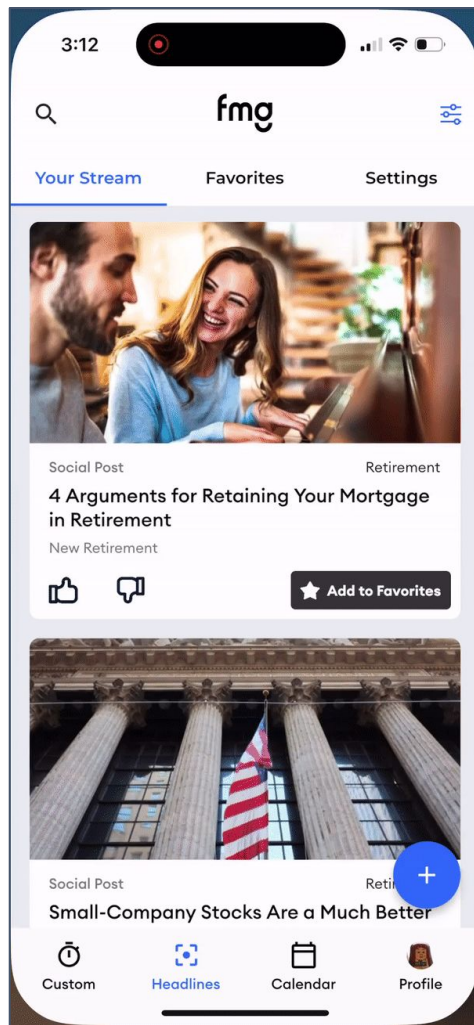
**FMG's Overwatch
tool**



**Use AI to help you write
zero-click content more
effectively on the fly**

FMG Mobile App: we created
zero-click social media posts
within our app to do it for you!

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02

How to Get Chat GPT + Other AI Tools to
Recommend Your Advisory Business

Have you gotten a lead from ChatGPT?



Ryan Kus • 1st

17h ...

President | Financial Planner | Podcaster...

Yes. We had our first lead from Chat GPT. Yesterday prospect contacted us and he found us on Chat. Fun stuff!

Like •  1 | Reply



Cathy Curtis, CFP® • 1st

17h ...

Empowering High Net Worth Single Women to...

a great prospect, now client found me using ChatGpt!

Like •  2 | Reply • 3 replies



Matt Hylland • 1st

1w ...

Flat-Fee, Fee-Only, Fiduciary Financial Advisor | Financial Plann...

Just had our first as well! Not sure how/why we are included, but won't complain I guess. We have a few YouTube videos and blog posts that get OK traffic on the topic. But was a surprise for sure



Chelsea Ransom-Cooper, CFP® • 1st

2w ...

Leading the Next Generation of Diverse Financial Planner...

Yes! This happened to us and they shared the prompt!



Chelsea Ransom-Cooper, CFP® • 1st

Leading the Next Generation of Diverse Financial Planner...

2w ...

Yes! This happened to us and they shared the prompt!

provide a list of black financial planners in philadelphia



Here is a list of Black financial planners in Philadelphia who are well-regarded in the industry:

1. Zenith Wealth Partners

- **Founders:** Jason Ray & [You]
- **Specialties:** Comprehensive financial planning, investment management, and financial literacy education, particularly for the next generation.
- **Location:** Philadelphia, PA
- **Website:** [Zenith Wealth Partners](#)

2. Malik S. Lee, CFP® - Felton & Peel Wealth Management

- **Specialties:** Holistic financial planning, investment management, and wealth-building strategies.
- **Location:** Philadelphia, PA
- **Website:** [Felton & Peel Wealth Management](#)

3. Angela Moore, CFP®, MPAS® - Modern Money Advisor

- **Specialties:** Financial coaching, retirement planning, debt management, and financial literacy for underserved communities.
- **Location:** Philadelphia, PA
- **Website:** [Modern Money Advisor](#)

4. Tiffany Lam-Balfour, CFP®

- **Specialties:** Retirement planning, tax planning, wealth management.
- **Location:** Philadelphia, PA
- **Website:** [Tiffany Lam-Balfour Financial](#)

5. Rashaun Williams, CFP® - 1875 Financial

- **Specialties:** Financial planning, investment management, and retirement strategies.
- **Location:** Bala Cynwyd, PA (suburb of Philadelphia)
- **Website:** [1875 Financial](#)



I want chat gpt and other ai tools to recommend my business when people are searching for a financial advisor.

What can I do to rank high ?

✓ **Answer: Focus On These 3 Things**

1 **Get Reviews** (Social Proof & Sentiment Signals)



I want chat gpt and other ai tools to recommend my business when people are searching for a financial advisor.

What can I do to rank high ?

✓ Answer: Focus On These 3 Things

1 Get Reviews (Social Proof & Sentiment Signals)

2 Build Reputation (Authority + Expertise)



I want chat gpt and other ai tools to recommend my business when people are searching for a financial advisor.

What can I do to rank high ?

✓ Answer: Focus On These 3 Things

1 Get Reviews (Social Proof & Sentiment Signals)

2 Build Reputation (Authority + Expertise)

3 Format Content for AI Discoverability (Schema Markup, FAQs + Q&As)

1. Get Reviews

Reviews (Social Proof & Sentiment Signals)

AI models/LLMs are trained to rely on social credibility *heavily*, and want to reflect broad consensus from actual humans

- Encourage clients to leave **Google reviews** using target keywords (e.g. “fiduciary financial planner in Denver”).
- Get reviewed on **Yelp, Trustpilot, Advisor platforms** (like SmartAsset), and industry-specific forums (like Bogleheads).
- Engage in **Q&A platforms** like Reddit, Quora, or Facebook Groups — these discussions can be surfaced or cited by LLMs.

2. Build Your Reputation 🏆🏆🏆

Reputation (Authority & Expertise)

The goal is to become the **“most obvious answer”** to a question like “Who’s a good retirement advisor near me?”

- Contribute to articles on well known sites like **Forbes, Kiplinger, Medium, or local news sites** (LLMs index from these).
- Get **quoted as an expert** via HARO (help a reporter out) or podcasts
- Maintain a well-optimized **LinkedIn profile** + encourage endorsements.
- Write original **long-form content** demonstrating niche knowledge (e.g., advisors for tech professionals, physicians, etc.)
- Publish in many formats, including podcasts, videos, on your blog and social

2. Build Your Reputation - How FMG Can Help

NICHE CONTENT:
Search the library!
-Blogs
-Social posts
-Video Scripts
-Podcast ideas



The screenshot displays the FMG Marketing Tools dashboard. On the left is a sidebar with navigation options: Content Library, Website, Blog, Automated Marketing, Email, Social, Events, Profile, Contacts, and Help. The main area is titled 'Content Library' and features a search bar with the query 'business owners'. Below the search bar are filters for Favorites, Category, Topic, and Author. A table of search results is shown with columns for Title, Category, Type, Author, and a 'Use' button. The results include various content types like Downloadables, Social Posts, Emails, and Web Content.

Title ↑	Category	Type	Author	
5 Retirement Strategies for Small-B...	Downloadables	Whitepaper/Ebook	FMG	Use
AEO for Small Business Owners	Social Posts	Social Post	Do It For Me	Use
Celebrate National Mom and Pop Busin...	Emails	Email	FMG	Use ⋮
Clients and Prospects - New Filing Requi...	Emails	Email	Do It For Me	Use ⋮
COI Version - New Filing Requirements f...	Emails	Email	Do It For Me	Use ⋮
Financial Strategies: Business vs. Personal	Emails	Email	Do It For Me	Use ⋮
Good Health is Good Business	Web Content	Article	FMG	Use ⋮

3. Format Content for AI Discoverability

Content Formatting + Structured Data (AI Discoverability)

Remember: you're not just writing for humans — you're writing for algorithms.

- Use **schema markup**: schema helps machines “understand” your business.
- Format content with **FAQs, bullet points, Q and As** for higher AI readability.
- Write blog posts and landing pages that **answer specific client questions** clearly and succinctly (good for featured snippets and LLM responses).
- Create **location-based pages** and service-specific pages — these improve relevance for AI when users include geography or niche terms in queries.

3. Format Content for AI - How FMG Helps

NEW FMG FEATURE:
FAQ Pages & Schema Markup



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fmgSections & TemplatesHub PagesFormsToolsResource CenterSchedule a Consultation

Frequently Asked Questions

Financial Planning Basics

What's the difference between a Roth IRA and a traditional IRA?

A traditional IRA allows for tax-deductible contributions (subject to income limits), with withdrawals taxed as ordinary income in retirement. A Roth IRA uses after-tax contributions with tax-free withdrawals in retirement. The choice between them often depends on your current tax situation, expected future tax rates, and retirement timeline.

How much should I save for retirement?

While individual situations vary, many financial professionals suggest saving 10-20% of gross income for retirement. However, this percentage may change based on factors like your age when you start saving, desired retirement lifestyle, and other sources of retirement income. We can help you determine a savings rate that aligns with your specific retirement goals.

What is an emergency fund and how much should I have?

An emergency fund is money set aside for unexpected expenses like job loss, medical bills, or major home repairs. Most financial professionals recommend saving 3-6 months of living expenses in a readily accessible account. The exact amount depends on your job stability, family situation, and personal risk tolerance.

This FAQ is for informational purposes only and should not be considered personalized financial advice. Please consult with a qualified financial advisor to discuss your specific situation.

Still have questions? Fill out our contact form below!

Have a Question?

Name

Email

Phone

Message

Submit

Contact
Office: 888.888.8888
Retirement

Quick Links
Retirement

The content is developed from sources believed to be providing accurate information. The information in this material is not intended as tax or legal advice. Please consult legal or tax professionals for specific information on matters involving individual circumstances. [Terms of this material](#) apply to all users.

NEW FMG FEATURE:

Easily Add FAQ Sections

×

Add a new section

What type of content do you want to add?

🔍 Search

×

Search

Text

Image

Boxes


Forms

Team

Carousels

Widgets


Article Library



January 31, 2024

Getting a Head Start on College Savings


A few strategies that may help you prepare for the cost of higher education.



January 31, 2024

9 Facts About Retirement

Regardless of how you approach retirement, there are some things about it that might surprise you.



January 31, 2024

A Taxing Story: Capital Gains and Losses

Understanding how capital gains are taxed may help you refine your investment strategies.

Load More

FAQ Section

What's the difference between a Roth IRA and a traditional IRA?

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Never Mind

Add Section

20

NEW FMG FEATURE:

Schema Markup

The screenshot displays the Schema Markup Validator interface. The left pane shows the JSON-LD code for an FAQPage schema, including various JavaScript snippets and the main schema structure. The right pane provides a structured preview of the schema data, showing the mainEntity, question, and answer for each FAQ item.

Schema Markup Validator

URL: <https://sections.fmgdemo.com/%2Ffaq-template>

Schema.org Documentation Schemas Validate About

Run new test

FAQPage (1)

FAQPage 0 ERRORS 0 WARNINGS

mainEntity	question	acceptedAnswer
<p>What's the difference between a Roth IRA and a traditional IRA?</p>	<p>A traditional IRA allows for tax-deductible contributions (subject to income limits), with withdrawals taxed as ordinary income in retirement. A Roth IRA uses after-tax contributions with tax-free withdrawals in retirement. The choice between them often depends on your current tax situation, expected future tax rates, and retirement timeline.</p>	
<p>How much should I save for retirement?</p>	<p>While individual situations vary, many financial professionals suggest saving 10-20% of gross income for retirement. However, this percentage may change based on factors like your age when you start saving, desired retirement lifestyle, and other sources of retirement income. We can help you determine a savings rate that aligns with your specific retirement goals.</p>	
<p>What is an emergency fund and how much should I have?</p>	<p>An emergency fund is money set aside for unexpected expenses like job loss, medical bills, or major home repairs. Most financial professionals recommend saving 3-6 months of living expenses in a readily accessible account. The exact amount depends on your job stability, family situation, and personal risk tolerance.</p>	

3. Format Content for AI - How FMG Helps

Format Blogs in a Question & Answer Style



Can Capital Gains Push Me Into a Higher Tax Bracket?

JULY 15, 2020

Can Capital Gains Push You Into a Higher Tax Bracket?

As an investor, you likely know that long-term capital gains (gains on assets held

3. Format Content for AI - How FMG Helps

Optimize for featured snippets (bulleted lists, short answers)

Here are a few potential federal tax-free sources of cash flow in retirement:

- Roth IRA and Roth 401(k) withdrawals that follow the rules
- Municipal bond interest
- HSA withdrawals used for qualified health expenses
- Certain types of withdrawals (of basis) or loans from cash-value life insurance
- Return of principal portion of investments
- Up to \$500k of gain from the sale of a primary residence if married, \$250k if single (subject to rules such as living there two of the past five years)

3. Format Content for AI - How FMG Helps

Write in a conversational style for AI search tools



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What Happens to Social Security Benefits When Your Spouse Passes Away and You're Still Working?

Nicole Burdick, AAMS® / January 06, 2025

Losing a spouse is one of the toughest experiences anyone can face, and it often comes with financial questions. If your spouse was receiving Social Security benefits and you're still working, you may wonder how this affects you—especially if you're not yet full retirement age.

One key factor to understand is the Social Security earnings test, which determines how much of the survivor benefit you can get while working. Here's a breakdown:

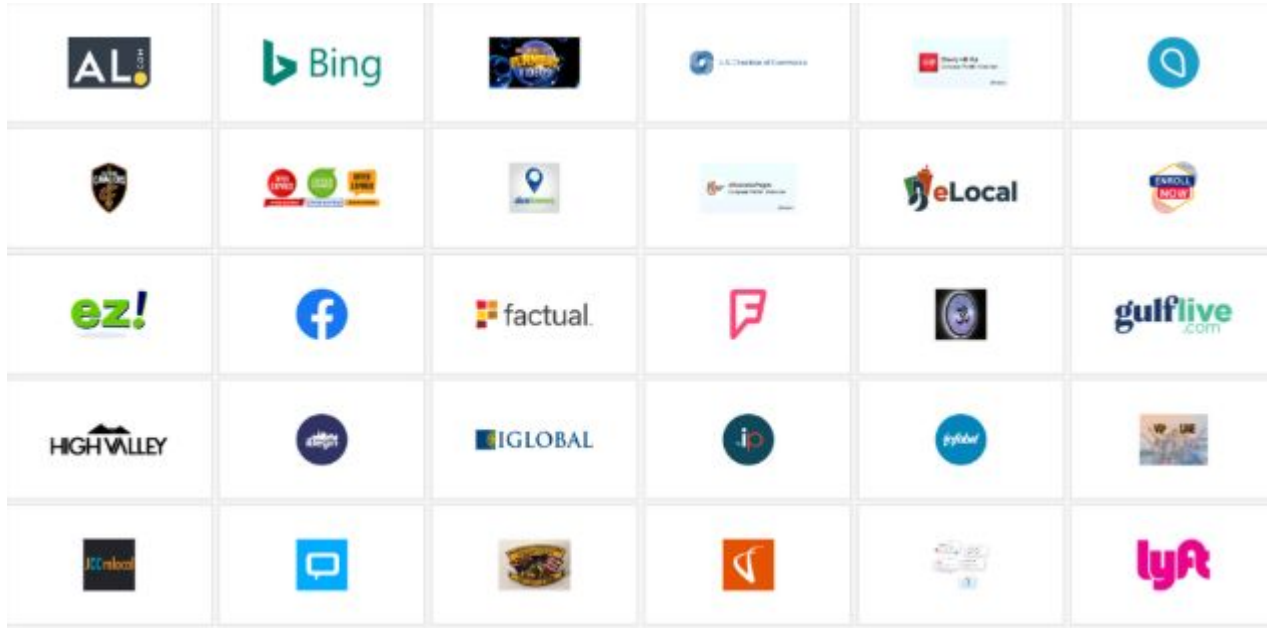
What Are Survivor Benefits?

[GET STARTED](#)



3. Format Content for AI - How FMG Helps

[Utilize FMG's Local Listings](#) to enhance your local search optimization



3. Format Content for AI - How FMG Helps

Have Multiple Offices? [Use FMG's Multiple Locations Feature](#) to Ensure Accuracy

[Preview Website](#)

Office Locations

Have one or more offices? Add any physical office locations here.

Offices

Add Location

Primary	Location	Status
<input checked="" type="checkbox"/>	Main office	Published Edit Delete

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[Have an idea to improve FMG? Let us know here.](#)

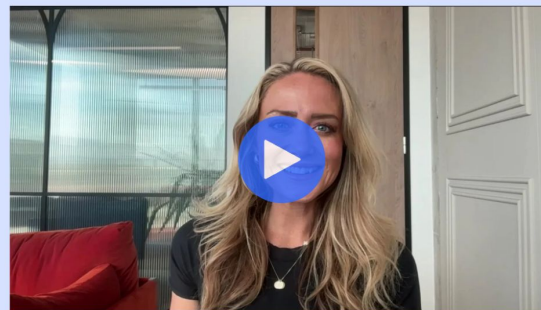
Get Better Results

Book a Call



fmg

AI, Built In: Smarter Marketing Starts with FMG



FMG's all-in-one platform now includes powerful AI tools—

designed specifically for financial advisors. These tools are built directly into the platform, helping advisors create high-quality, personalized marketing in less time, without sacrificing compliance.

Ready to see how AI can work *for* you?

- Draft emails and social posts in seconds with

Got 20 Minutes? Let's Make Your
Marketing Smarter

Samantha

Russell

samantha.russell@fmgsuite.com

Want to learn more?

Book a 20-minute consult →

Questions? Marketing@fmgsuite.com

