

How to...



Write **FAQ Pages** that **Work with AEO**



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.**

fmg

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](#)

Or maybe you feel like this....

Just Wow - Eye opening. People are asking AI to recommend a financial advisor to them? I had no idea.



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 ?

✓ If you want AI to recommend you – 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)



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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?

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.

Never Mind

Add Section

9

01

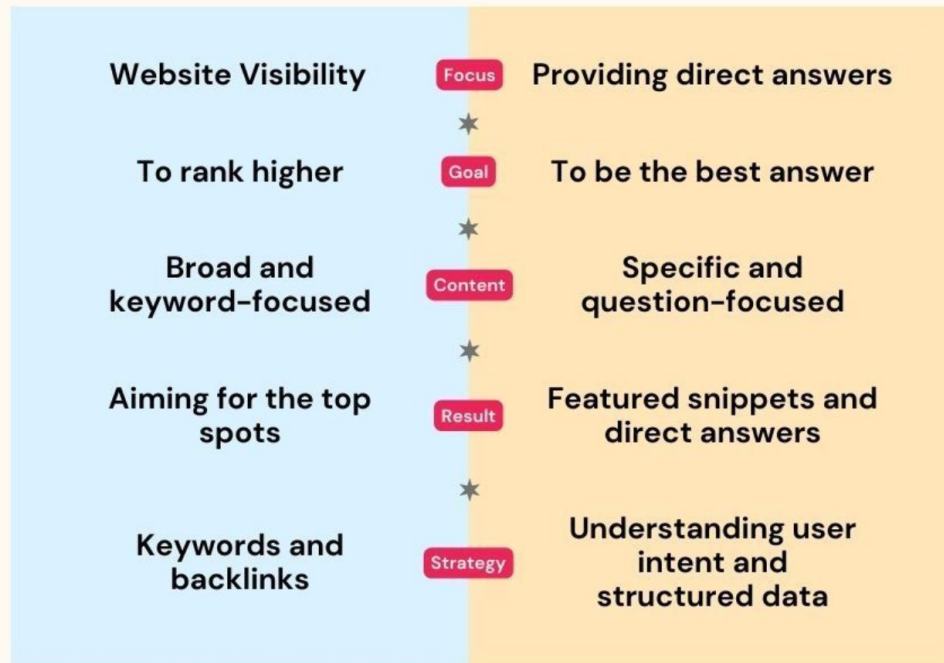
 What AEO is and why structured pages like this matter



SEO vs AEO

(Search Engine Optimization)

(Answer Engine Optimization)



02

 What type of questions to include

I am getting ready to retire in a few years and want to find a financial advisor to work with near me in Charlotte NC who can help me come up with a good plan and budget. who should I work with and what questions should I ask?

If you're preparing to retire and looking for a trusted financial advisor in Charlotte, here are some solid options to consider—and key questions to ask them.

What to Ask Potential Advisors

To find the right fit, here are essential questions to ask:

1. **Are you acting in a fiduciary capacity?** Meaning, are you legally required to put my interests first?
Ask for SEC registration or peer organization membership like NAPFA. [Investopedia](#) [wsj.com](#) +3
2. **What are your services and specialties?** (e.g., retirement income planning, tax strategies, estate planning, Social Security timing, insurance).
3. **How do you get paid?** Fee-only? Commission? Flat fee, hourly, or assets under management? Ensure compensation is clear and aligned with your goals. [feenetwork.com](#)
4. **What are your qualifications?** Look for CFP®, CIMA®, CPA, experience levels, or peer-reviewed credentials (e.g., NAPFA) [Wikipedia](#) +1 .
5. **Do you have a minimum asset requirement, and does that align with my situation?** Some firms require high minimums, while others (e.g., hourly planners) may be more flexible [Investopedia](#)
[smartasset.com](#) [feenetwork.com](#) .
6. **Will you provide a holistic plan?** Including budgeting, income projections, investments, tax planning, estate and insurance planning.
7. **How will we communicate and how often?** (In-person, video, phone? Regular reviews?)
8. **Can you share references or testimonials?** Hear from current clients and possibly compare reviews.

ChatGPT 5 ▾

what questions should you ask a financial advisor before hiring them

Here's a comprehensive list of smart, practical questions you should ask a financial advisor before deciding to hire them, grouped by category so you can cover all the bases.

1. Background & Credentials

- **What licenses, certifications, or designations do you hold?** (e.g., CFP®, CFA®, CPA)
- **How long have you been a financial advisor?**
- **Have you ever been disciplined by any regulatory body?** (Check FINRA's BrokerCheck or the SEC's website for confirmation.)
- **Do you specialize in working with clients like me?** (age, profession, financial situation)

2. Services Offered

- **What areas of financial planning do you cover?** (Investments, retirement, tax planning, estate planning, insurance, etc.)
- **Do you provide ongoing financial planning or one-time plans only?**
- **Do you handle investment management, or just offer advice?**
- **Do you create customized plans, or do you use standard model portfolios?**

3. Fees & Compensation

- **How are you paid?** (Fee-only, commission, fee-based, hourly, retainer)
- **What is your fee structure?** (percentage of assets, flat fee, hourly)
- **Can you give me a full breakdown of all potential costs, including fund expenses and transaction fees?**
- **Do you receive commissions or incentives for recommending certain products?**

7. Client Experience

- Can you provide references from clients with similar situations to mine?
- What's your typical client profile?
- What's your client retention rate?
- Do you work alone or with a team—and will I have a dedicated contact person?
- How often will we meet or review my plan?
- What type of performance reports will I receive, and how frequently?
- How will you communicate with me—email, phone, in-person meetings?
- What's your process if my financial goals or circumstances change?

03

 Where on your website to include FAQ page(s)

Format Content for AI - How FMG Helps

NEW FMG FEATURE:
FAQ Pages & Schema Markup



888.888.8888info@fmgdemo.comLogin

fmgSections & TemplatesHub PagesFormsToolsResource CenterSchedule a Consultation

Frequently Asked Questions

Financial Planning Basics

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

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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

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 concerning your individual situation. [Terms of this material](#) and [disclaimer](#)

04



Examples of websites doing this well

FAQ'S

Do I need a Financial Advisor?

We believe everyone needs a financial coach, someone to guide them to make smart financial decisions. This may require a Financial Advisor.

I want to retire and be a millionaire. What does it take?

It takes your subconscious mind and discipline. Have a budget. Sit down with a financial advisor to breakdown your goals down on a weekly, monthly and yearly basis. Have a specific goal, whether it is for yourself, your family or your business and we will work with you towards your ultimate goal.

My parents are getting older. How do I protect the assets they worked so hard for?

Educate yourself on Estate Planning and Trusts, and work with a Financial Advisor to understand the documentation.

Why choose an independent Financial Advisor?

With large financial firms, layers of management and regulatory might lead to a biased decision for your finances, narrowing you down to the companies needs. We look out for you. As an independent Financial Advisor, we strive to do what is right for the client.

How will my client experience with Bay Ridge Financial Group be unique from other advisors?

We get into the personality of the client. We want to work with the various hurdles in your life that affect your finances and create a plan for you that aims to help you save money.

Our advisors come from a large corporate background, are educated, and we are an independent firm. We have worked with a gamut of clients from all walks of life.



Home

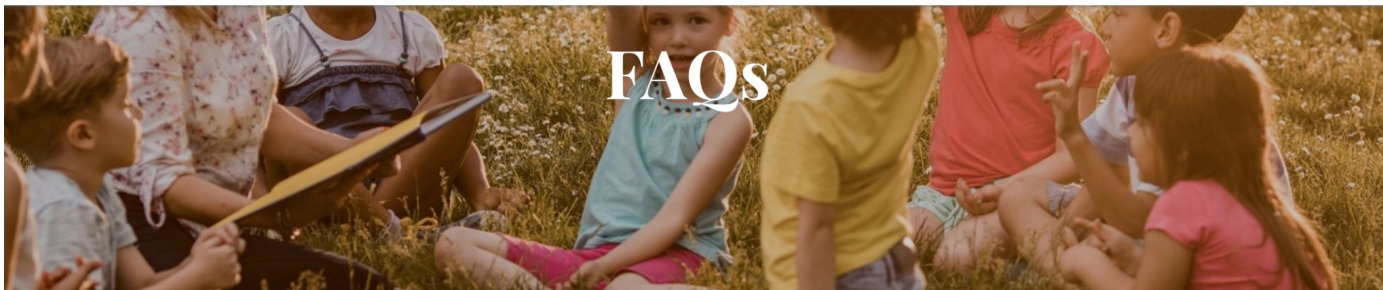
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Services ▼

Media ▼

Resource Center ▼

Contact



Why work with a CFP® professional? ▼

Anyone can call themselves a financial planner, but to be a CERTIFIED FINANCIAL PLANNER™, an advisor must meet several criteria including:

- Complete comprehensive financial planning education
- An undergraduate degree
- 3+ years of client-related financial planning experience
- Pass rigorous exam (historical pass rate of 55-60%)
- Complete continuing education requirements of 30 hours every two years
- Adhere to strict ethical standard outlined in CFP® Board's Standards of Professional Conduct

When you work with a CFP® professional, you can rest assured that you are receiving high-quality, expert advice in your best interest. You'll know that you are working with a well-educated advisor dedicated to the profession and the highest ethical standards. Visit the CFP® Board Website to learn more about what makes CFP® professionals different.

What is KGF's investment philosophy? >

Is there a minimum investment required? >

Retirement Planning

What is tax-efficient retirement income planning?

It's a strategy for taking money out of retirement accounts in a way that reduces the taxes you pay. Our software helps you get the most out of every dollar.

Can I roll my Roth 401(k) into a Roth IRA?

Yes, especially after leaving a job. This move can give you more investment control and fewer rules — but it's important to do it correctly to avoid taxes or penalties.

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

Roth IRA: Money grows tax-free and withdrawals are tax-free in retirement.

Traditional IRA: Contributions may be tax-deductible, but withdrawals are taxed. We help decide what's best for you.

What are Required Minimum Distributions (RMDs)?

RMDs are mandatory withdrawals from traditional retirement accounts starting at a certain age (currently 73). Not taking them on time can lead to penalties. We help clients plan for this.

What's the cost of not planning for retirement income?

Without a plan, you could pay more in taxes, run out of money early, or retire later than expected. A personalized income strategy helps you avoid those risks.

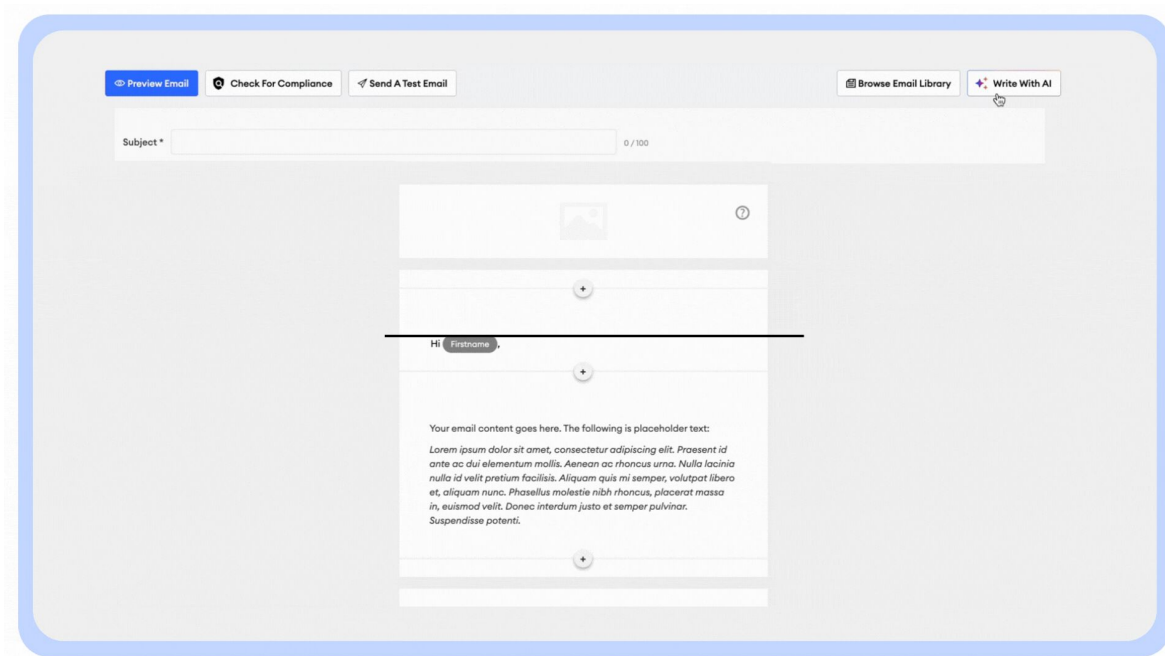
05



How FMG Can Help

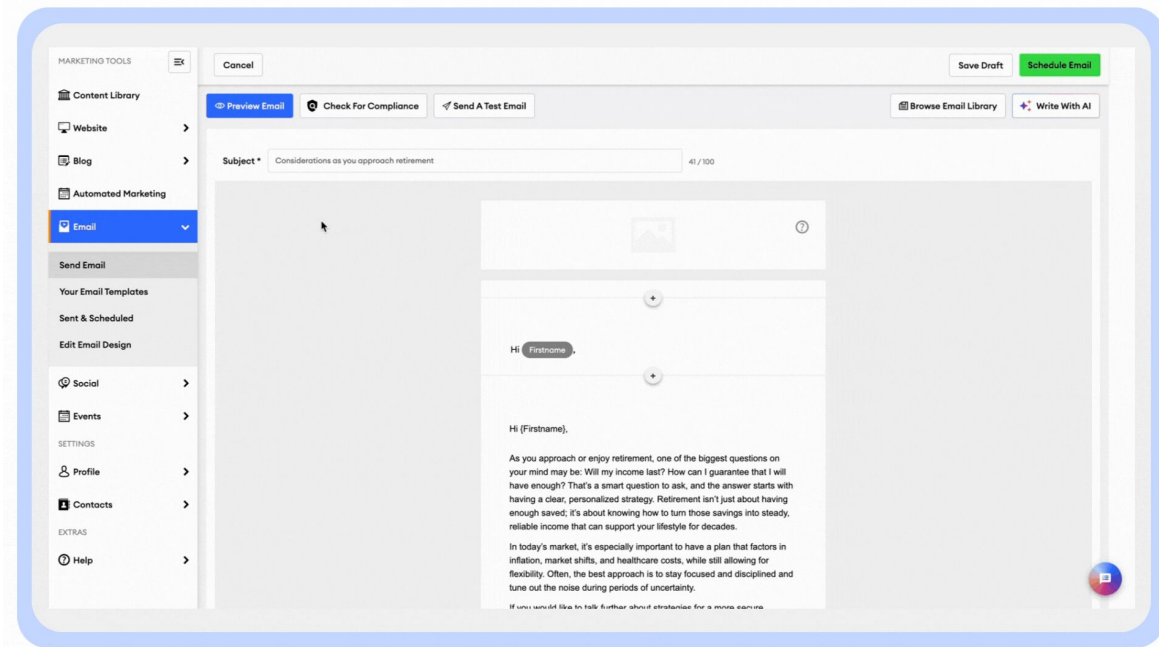
Use AI to help you
write content more
efficiently and
effectively

FMG's MUSE for
social and email



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

**FMG's Overwatch
tool**



Build Your Reputation with Content - How FMG Can Help

NICHE CONTENT:

Search the library!

- Blogs
- Social posts
- Video Scripts
- Podcast ideas



Marketing Calendar Inbox 1 Drafts 2 Compliance 11 Samantha Russell

MARKETING TOOLS

- Content Library
- Website
- Blog
- Automated Marketing
- Email
- Social
- Events
- SETTINGS
- Profile
- Contacts
- EXTRAS
- Help

Content Library

business owners Search

Favorites Category Topic Author

| 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 |

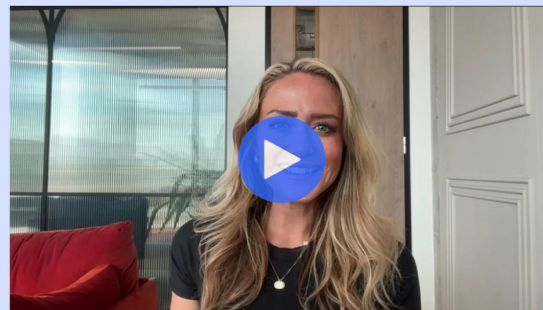
Get Better Results

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

