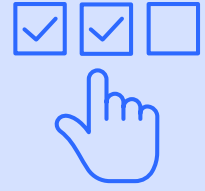




Financial Advisor Review Audit Checklist



Use this checklist to evaluate where you stand with online reviews and **identify opportunities to strengthen your social proof and AI search visibility.**

Current Review Inventory

Google Business Profile

- ☐ Search your firm name on Google
- ☐ Verify your Google Business Profile is claimed and active
- ☐ Total number of Google reviews: _____
- ☐ Average star rating: _____
- ☐ Date of most recent review: _____
- ☐ Date of oldest review: _____
- ☐ Number of reviews in past 3 months: _____
- ☐ Number of reviews in past 12 months: _____

FMG Testimonials

- ☐ Do you use a testimonial solution? Yes ___ No ___
- ☐ Total reviews: _____

Other platforms (Yelp, Better Business Bureau, etc.)

- ☐ Platform name: _____
- ☐ Total reviews: _____
- ☐ Most recent review date: _____

Your Website

- ☐ Do you have a testimonials/reviews page? Yes ___ No ___
- ☐ Number of testimonials displayed: _____
- ☐ Are reviews dated? Yes ___ No ___
- ☐ Do you display video testimonials? Yes ___ No ___
- ☐ Number of video testimonials: _____
- ☐ Are required compliance disclosures included? Yes ___ No ___

LinkedIn (Personal)

- ☐ Number of recommendations: _____
- ☐ Most recent recommendation date: _____

Review Quality Assessment

Recency Analysis

Reviews lose impact over time. AI platforms prioritize fresh testimonials.

- ☐ Number of reviews from past 6 months: _____
- ☐ Do you have consistent monthly reviews? Yes ___ No ___

Recency Score:

10+ reviews in past 6 months = Excellent ★★★

1-4 reviews in past 6 months = Needs improvement ★

5-9 reviews in past 6 months = Good ★★

0 reviews in past 6 months = Critical gap 🚨

Content and Keyword Analysis

Generic reviews (“Great advisor!”) don’t help AI understand your expertise.

Review your last 10 testimonials and check for:

- ☐ Do reviews mention specific services? (retirement planning, tax strategy, estate planning, etc.)
- ☐ Do reviews describe specific problems you solved?
- ☐ Do reviews include details about your process or approach?
- ☐ Do reviews mention your target demographic?
- ☐ Do reviews mention your geographic area or community?

Count how many of your last 10 reviews include:

- ☐ Specific service keywords: _____ out of 10
- ☐ Client challenges/problems addressed: _____ out of 10
- ☐ Detailed experiences (3+ sentences): _____ out of 10

Keyword Quality Score:

7-10 detailed reviews = Excellent ★★ ★

1-3 detailed reviews = Needs improvement ★

4-6 detailed reviews = Good ★★

0 detailed reviews = Critical gap 🚨

Star Rating Analysis

- ☐ Average rating across platforms: _____
 - ☐ Do you have any negative reviews (3 stars or below)? Yes ___ No ___
 - ☐ If yes, have you responded to them? Yes ___ No ___ N/A ___
 - ☐ Are negative reviews older than 12 months? Yes ___ No ___ N/A ___
-

AI Search Visibility Test

AI platforms are increasingly how prospects discover advisors. Test your visibility:

Google AI Overview Test

- ☐ Search: “best financial advisor in [your city]”
- ☐ Are you mentioned in AI Overview? Yes ___ No ___
- ☐ Which advisors appear? _____

ChatGPT Test

- ☐ Go to ChatGPT (chat.openai.com)
- ☐ Ask: “Who are the top-rated financial advisors in [your city]?”
- ☐ Are you mentioned? Yes ___ No ___
- ☐ Which advisors are recommended? _____
- ☐ What information does ChatGPT cite? _____

Perplexity Test

- ☐ Go to Perplexity (perplexity.ai)
- ☐ Ask: “Best financial advisors in [your city] with good reviews”
- ☐ Are you mentioned? Yes ___ No ___
- ☐ Which advisors are recommended? _____
- ☐ What sources does Perplexity cite? _____

Build Your Social Proof Engine with FMG Testimonials

Learn how FMG Testimonials can help you systematically collect, manage, and showcase client reviews across every platform – all while staying fully compliant.

Book a demo to see FMG Testimonials in action.

[Schedule Now](#)

