



LIVE WORKSHOP:

The 7-Day Testimonial Playbook

How Advisors Can Launch a Testimonial
Program That Scales and Keeps Them Visible



Andrew Johnson
Director of Product

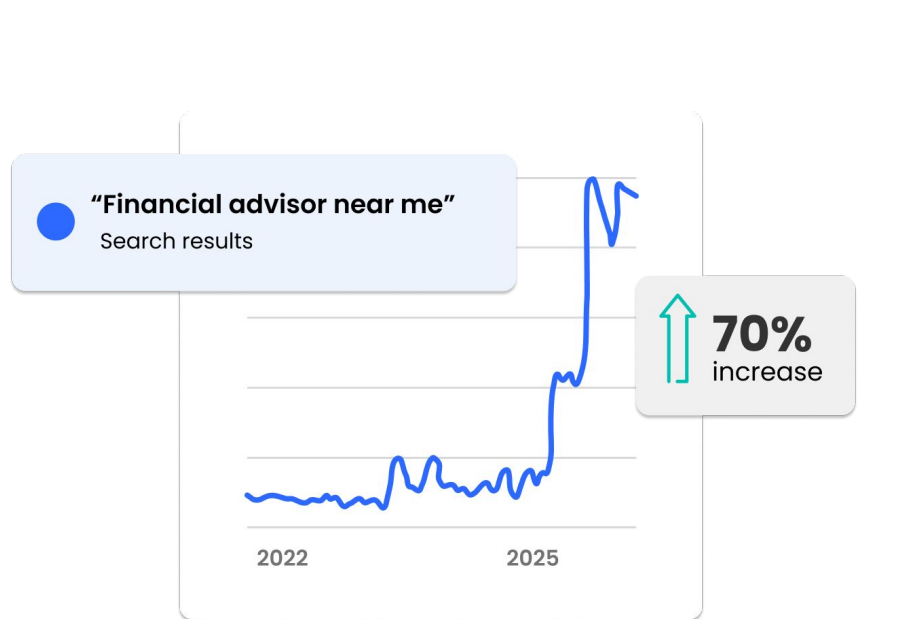


Susan Theder
CMO & CXO



Samantha Russell
Chief Evangelist

Winning Local Search is Imperative for Advisors

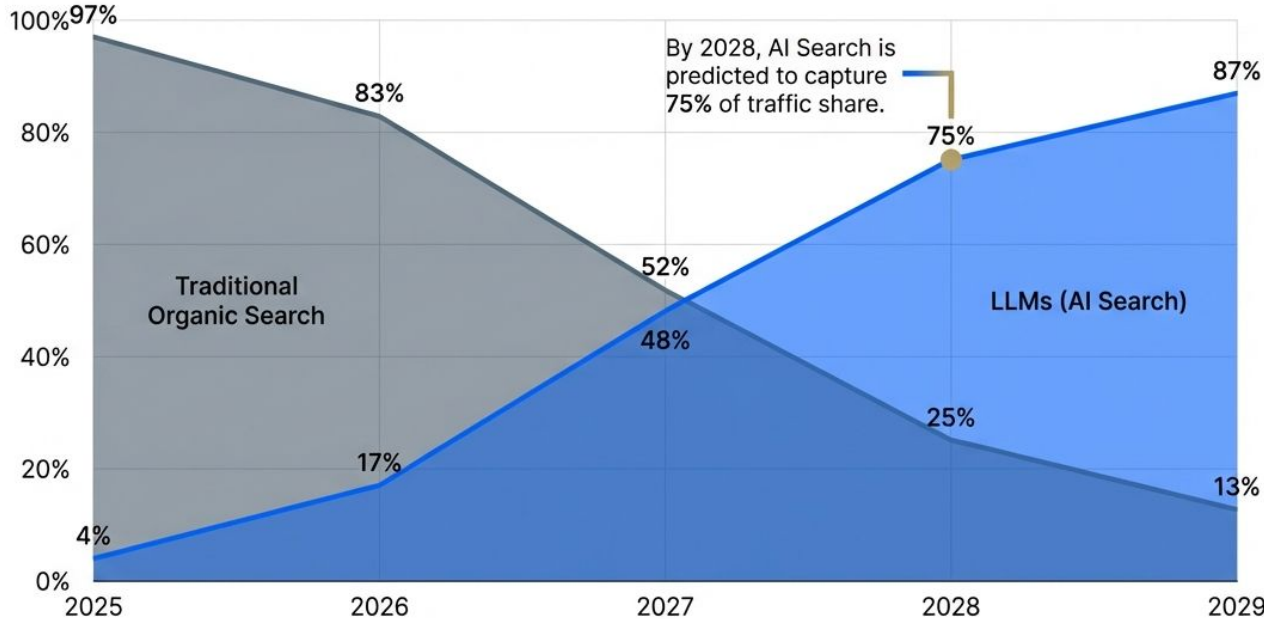


Search engines — and AI — now prioritize proof over pages

Reviews and testimonials supply the trust signals and language AI uses to decide who gets surfaced, summarized, and recommended.

No one wants links anymore. They just want the answer

Search is evolving from “finding links” to “getting answers.”



Source: SEMRush



How Do You Compete? AEO

(Answer Engine Optimization)

Testimonials & Social Proof

Tactics That Move the AEO Needle:

- ❖ Testimonials
- ❖ Public Reviews
- ❖ Online discussion about the firm/brand



How FMG Solves for This:

- Launch of FMG Testimonials to collect client feedback
- Ability to push testimonials to Google Reviews
- Testimonial widget to display on advisor websites

Build Reputation & Demonstrate Expertise

Tactics That Move the AEO Needle:

- ❖ Press Releases
- ❖ Media Mentions
- ❖ Social Media
- ❖ Hyper-Niche Content
- ❖ Author = advisor, not 3rd party



How FMG Solves for This:

- Launch of MUSE, AI tool that allows advisors to create hyper-specific content for their niche
- Ability for each advisor to have their own "brand" and content pages within the firm-level brand.

Format Content for AI

Tactics That Move the AEO Needle:

- ❖ Schema Markup
- ❖ Summary Boxes at Top
- ❖ FAQ pages
- ❖ FAQ sections within pages
- ❖ Content Formatted Q and A style (headers, titles)



How FMG Solves for This

- Launch of built-in FAQ widget with Schema markup that can be added to any page
- Summary Boxes at top of all DIFM blog content
- Ability to format all content within pages for AEO

New FMG Tool To Format for AI

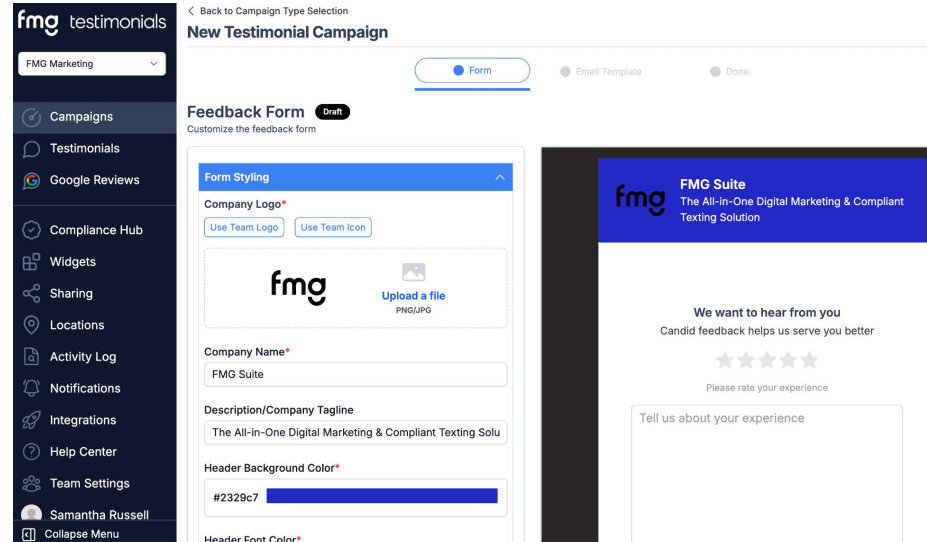
FAQs with Built-In Schema Markup

- Helps advisors' sites show up when prospects use AI search tools
- AI-friendly structure (no setup required)
- Users can add optimized FAQs to any page with one click

The screenshot displays the FMG website interface. At the top, the 'fmg' logo is on the left, and navigation links for 'Sections & Templates', 'Hub Pages', 'Forms', 'Tools', 'Resource Center', and a 'Schedule a Consultation' button are on the right. The main content area features a 'Frequently Asked Questions' header over a background image of hands typing on a laptop. Below this, a section titled 'Financial Planning Basics' contains several FAQ items, including 'What's the difference between a Roth IRA and a traditional IRA?' and 'How much should I save for retirement?'. A sidebar menu on the left lists various content types: Text, Image, Boxes, Forms, Team, Carousels, and Widgets (which is highlighted in blue). A 'Add a new section' dialog box is open in the foreground, prompting the user to search for the type of content they want to add.

How FMG Testimonials Works:

- **Get Client Feedback via Automated Surveys**
Advisor sends a short survey to collect written feedback, star ratings, and client details. Feedback is private by default and can be used internally or publicly.
- **Consistent, Repeatable Process**
You define when survey is sent (e.g., after onboarding or annual reviews). Once set, the process runs automatically and avoids one-off or selective requests.
- **Compliance Review & Oversight** Survey language, disclosures, and testimonial usage can be reviewed and approved in advance, with full audit logs and recordkeeping.
- **Option To Push To Google Reviews**



The Problem:

Advisors have loyalty, but it's invisible. Manual collection is non-compliant or difficult.

The Opportunity:

Testimonials influence decisions BEFORE a click.

Stat: "Financial advisor near me" searches convert ~4.4x better than traditional organic traffic.

What Our Clients Are Saying

Ed B.
★★★★★
"We have had a great experience with Andy Smith. I immediately felt comfortable with him. We believe he is trustworthy and very knowledgeable about how to help us navigate our finances and retirement. And it's funny, and it's really important. Finances, here sure such a heavy issue."

Michael M.
★★★★★
"Cinialis is like a member of our family! We so appreciate her knowledge, her helpfulness, her professionalism, her availability and her care!"

Dorothy V.
★★★★★
"My experience with the team in Quincy has always been great. Elliot Herman, Cheryl and their team of experts has been professional and rewarding. Keep up the great work."

Alexander R.
★★★★★
"We have been with Edelman for over a decade and cannot be more pleased with the outstanding service we receive each year. Isabel is absolutely amazing and we are fortunate to have a supporting our financial requirements."

Margo G.
★★★★★
"Laela Erickson has been an amazing advisor. She comes to me and my spouse and always realistic in her expert guidance. Love this ever-changing economic environment."

A compliant system to generate and publish social proof.



Automated Surveys

Triggered after onboarding or annual review. Collects star ratings and written feedback.

Compliance Review

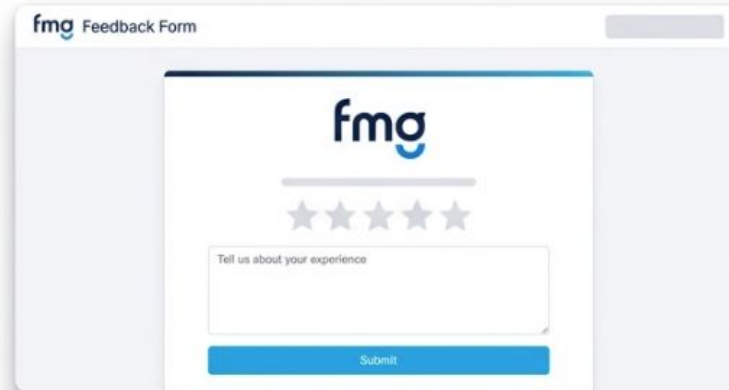
Private by default.
Pre-approved language.
Full audit logs included.

Publishing

Approved testimonials automatically refresh on advisor websites.

Push to Google

Syncs with Google Reviews to strengthen local search visibility.



[About Us](#)[Personal Services](#)[ESG / Impact](#)[Resource Center](#)[Events](#)[Tools](#)[Blog](#)[Contact](#)

SUCCESS STORIES

Read What Our Clients Are Saying

Read about real experiences from our clients.



★★★★★ 4 years ago

The Artifex Financial Group has been exceptional at meeting our needs over the years. Our recent meetings to discuss goals, both personal and financial, was helpful to gain better perspective of the "big

[Show more](#)

★★★★★ 5 years ago

Working with Artifex has been great for our family. Jerry is always looking out for what is best for our situation. One of the things we really appreciate is how he always takes the time to make sure we fully

[Show more](#)

★★★★★ 5 years ago

ARTIFEX has helped me and my family with personable service, state of the art financial software, and sound advice I feel like Doug, Alex and the entire group have provided a financial plan geared towards my

[Show more](#)

The testimonials displayed are from current clients. Clients were not compensated and there are no material conflicts of interest. Testimonials may not be reflective of the experience of all clients and are not a guarantee of future performance.



7 Day System To Start Getting Testimonials



A compliant, systematic process — from zero to social proof in just one week.

Real Advisory Firm Case Study:

"We've always known our clients love us. But when I went to Google and looked at reviews, it just wasn't reflected."

— Firm's Chief Marketing Officer

Challenge:

- 100's of advisors generating client loyalty; but limited inconsistent online reviews
- Growing pressure for advisors to be visible in Google and AI search
- Manual testimonial oversight created compliance strain
- Need for a systematic, defensible process (no cherry picking)

Result: From invisible to dominant in 6 months
10-20x review growth, 2.5→4.75 star rating, Increase in Top 3 Map Pack rankings



[MID-CAREER PROFESSIONALS](#) [GOOGLE EMPLOYEES](#) [AMAZON EMPLOYEES](#) [META EMPLOYEES](#) [WALMART EMPLOYEES](#)

Our Experience Working With Amazon Employees



Our team has a wealth of experience in working with clients at Amazon. If you work at Amazon, it's likely you've been granted stock as part of your overall compensation package. We've helped product managers make decisions around their RSUs, engineers add after-tax contributions to their 401(k)s. And we've designed **Financial Life Plans®** that are tailored for Amazon employees to achieve their goals.



What is Amazon's RSU Vesting Schedule?

Most clients we've seen at Amazon have vesting schedules that operate under the 3-4 year semi-annual schedule.

Here's Amazon's vesting schedule:

- Year 1: 5%
- Year 2: 15%
- Year 3: 40%
- Year 4: 40%
- And Years 1 and 2 are each a cliff, followed by semi-annual payouts in Years 3 and 4.



So the same 100 shares at Amazon would be paid out like this:

- Beginning of Year 2 | 5% payout for Year 1: 5 shares
- Beginning of Year 3 | 15% payout for Year 2: 15 shares

Every Website Needs TWO Calls To Action:

- 1. Primary
- 2. Secondary

The screenshot shows a lead capture form for a free guide. On the left, there are three overlapping document thumbnails with titles: "1. WHAT ISSUES SHOULD I CONSIDER REGARDING MY RESTRICTED STOCK UNITS?", "2. WHAT ISSUES SHOULD I CONSIDER REGARDING MY RESTRICTED STOCK UNITS?", and "3. WHAT ISSUES SHOULD I CONSIDER REGARDING MY RESTRICTED STOCK UNITS?". To the right of the thumbnails is a yellow arrow icon and the text "Download the free guide:". Below this is the main title of the guide in bold: **"What Issues Should I Consider Regarding My Restricted Stock Units?"**. At the bottom of the form, there are three input fields: a white box labeled "Name", a white box labeled "Email Address", and a dark green button labeled "Download And Confirm Your Email".

Amazon Benefits Frequently asked questions:

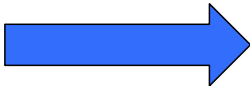
- Who has access to After-Tax 401(k)?
- How do After-Tax 401(k) contributions work at Amazon?
- What is a Mega Backdoor Roth IRA?



I work at amazon and have the amazon 401K and some RSUs. I want to find a financial ad

Here are several firms that explicitly advertise their expertise in helping Amazon employees:

- **Avier Wealth Advisors:** This firm details its experience with Amazon's RSU vesting schedule, the mega backdoor Roth conversion, and strategies for managing concentrated stock positions.
- **Brighton Jones:** This company has a long history of advising Amazon employees and has partnered with Connect@Amazon to offer resources on maximizing RSUs, 401(k)s, and other benefits.
- **Consilio Wealth Advisors:** Consilio focuses on tech professionals and understands the unique compensation structure at Amazon, including how to handle RSUs and the 401(k).
- **Drucker Wealth:** With experience working with Amazon product managers and engineers, Drucker Wealth helps clients navigate RSUs and after-tax 401(k) contributions.



The Guide Is Coming Your Way!

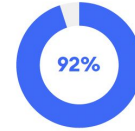
The image shows the front cover and a preview of the book 'Build a Compliant Testimonial System' by fmg. The cover is light blue with a dark blue 'fmg' logo in the top left and a blue badge in the top right that says 'UPDATED FOR 2026!'. Below the logo, it says 'A Guide for Financial Advisors' and 'Build a **Compliant Testimonial System** That Grows Your Practice'. A large blue arc is at the bottom. The page preview on the right shows a section titled 'Visibility,' with a donut chart showing 92% of Google reviews about financial advisors are 5 stars*. Below this, there are sections for 'PART 2' and 'PART 4' with titles like 'Setting the Green Light: Compliance Considerations' and 'Showcasing Testimonials Strategically'. The bottom of the preview shows the 'fmg' logo and 'Testimonial Guide 2'.

fmg UPDATED FOR 2026!

A Guide for Financial Advisors

Build a **Compliant Testimonial System** That Grows Your Practice

Visibility,



of Google reviews about financial advisors are 5 stars*

fundamentally changed. AI-
gle's AI Overviews are now factoring

signal that determines whether AI

age through four areas:

PART 2

Setting the Green Light: Compliance Considerations
to SEC requirements and present
case to your compliance team

PART 4

Showcasing Testimonials Strategically

by reviews across your marketing
annels while staying compliant

at building a scalable engine
ur practice.

*Kitooz
fmg

Testimonial Guide 2

**Want to see how FMG can
help you with all this in 2026?**

Book a 20-minute consult →

Questions? Marketing@fmgsuite.com

