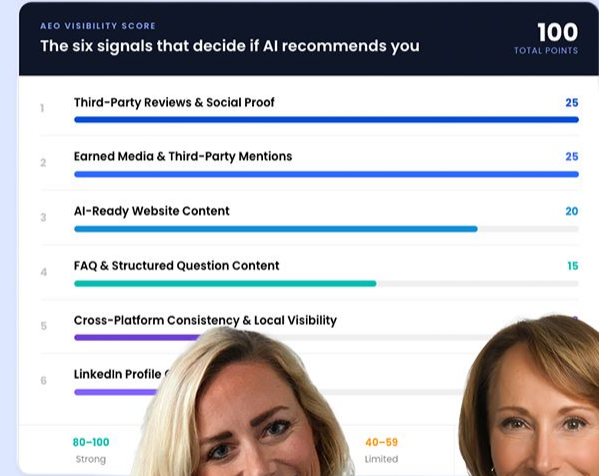




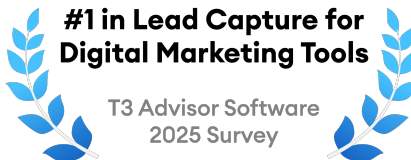
LIVE DISCUSSION:

How Visible Are You to AI? Live AEO Visibility Audits



Who Is FMG? An award-winning marketing suite.

Built just for you.



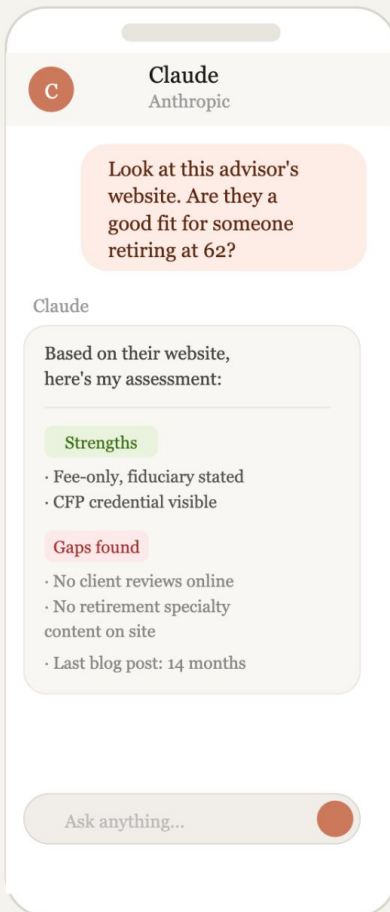
Our expertise is **showing off yours.**

fmg

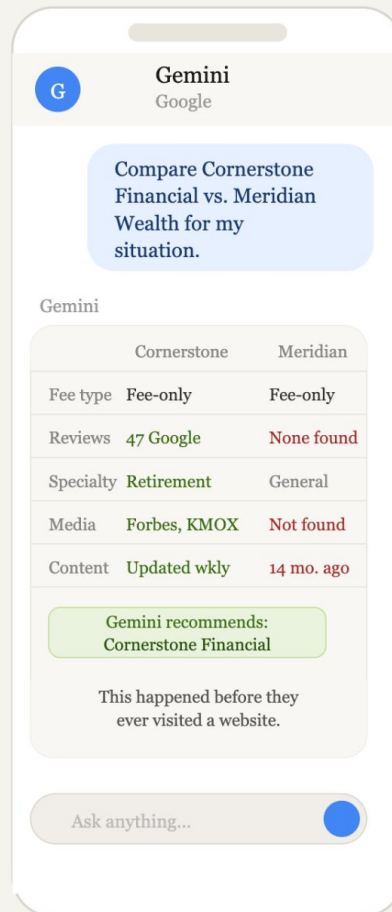
Discovery



Evaluation

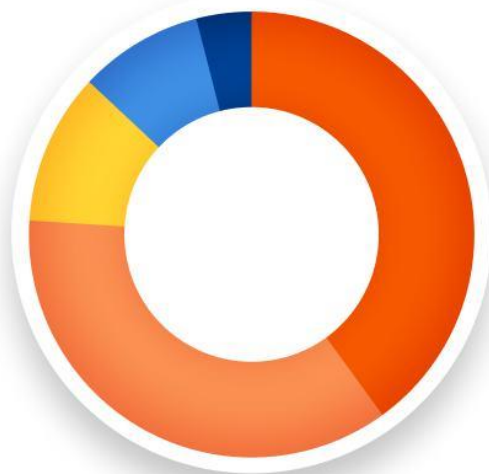


Selection



Your next client is already doing this. The question is whether AI can find you.

Where People Get Answers Today



40%

Google / Search Engines

36%

AI Tools

ChatGPT, Copilot, Etc

11%

Direct To Website / App

9%

Social Media / Forums

4%

Other

WHAT TO DO NEXT:

If you're not optimizing for AI-driven search, you're missing a third of your audience.

Source: NP Digital — Apr/2026. Data from surveying 2,000 people in 16 countries.

041102610A_K

Your online presence now has 2 audiences.



Audience 1: The Robots

AI tools like ChatGPT, Claude, and Gemini scan your entire digital presence **before any human ever sees your website.**

They're deciding right now whether to recommend you to a prospect — based on signals most advisors don't know exist.



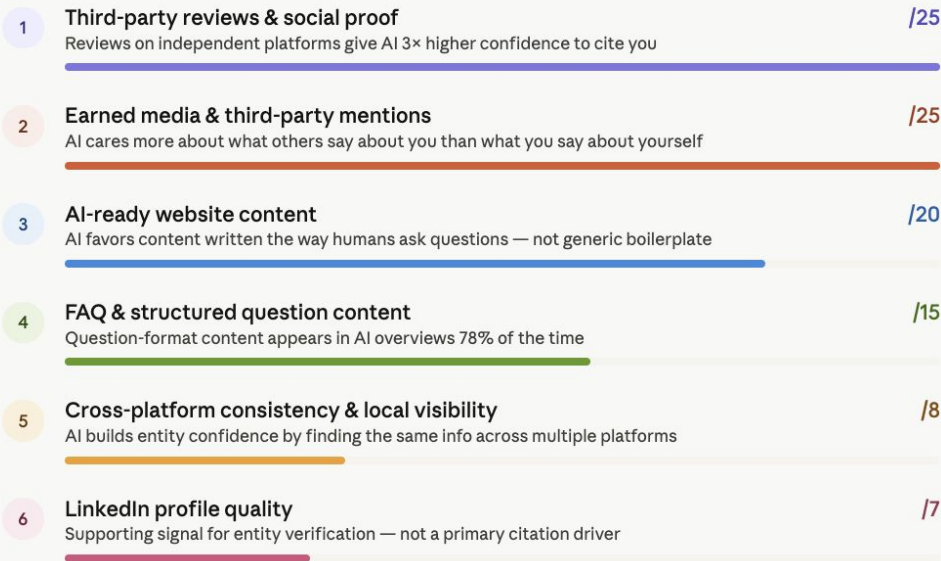
Audience 2: The Humans

Once a prospect sees your website or linkedin, etc **you have <5 seconds.**

They need to instantly see that you understand them that you **work with people just like them, speak their language, and have solutions to their problems.**

What converts them is completely different from what got them there.

What AI is actually scanning for.



Total AEO visibility score

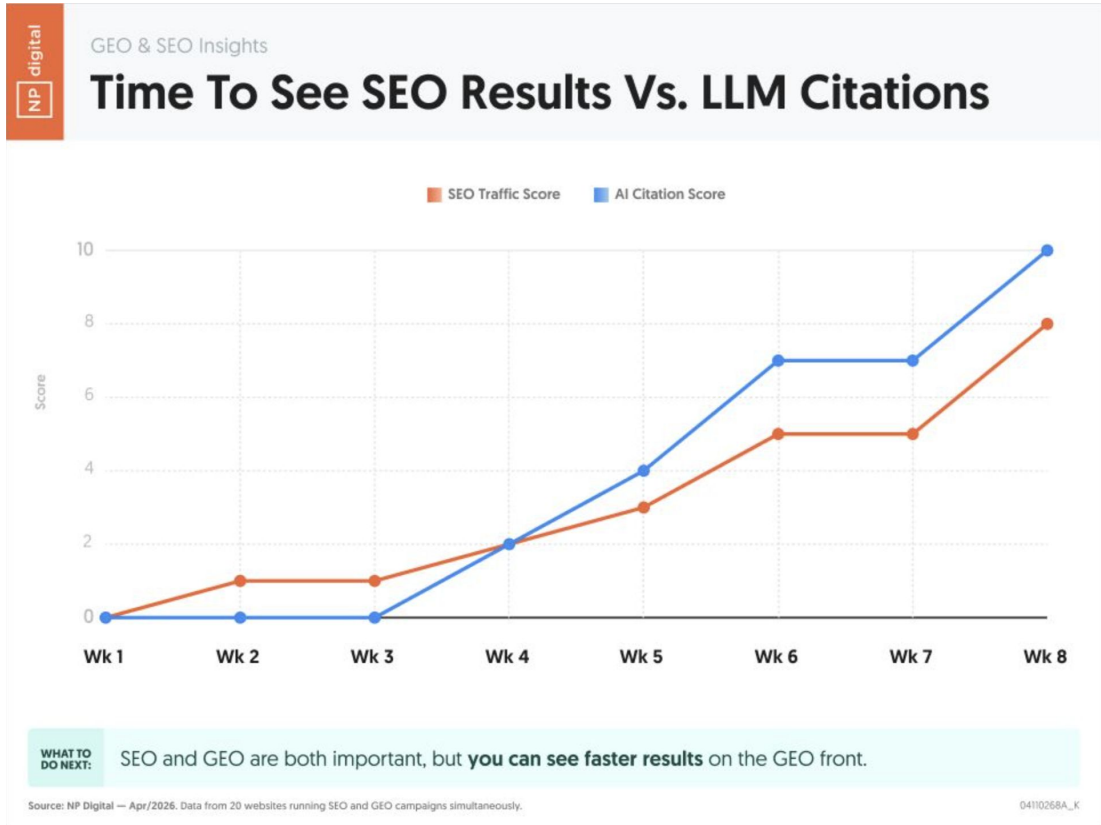
/100

80-100
Strong visibility

60-79
Moderate visibility

40-59
Limited visibility

0-39
Invisible to AI



Would AI recommend your firm?

Enter your details below. We'll audit your digital presence and tell you whether AI is likely to surface your firm — and what to do about it.

YOUR NAME

Gideon Drucker

FIRM NAME

Drucker Wealth

WEBSITE URL

<https://druckerwealth.com/>

CITY & STATE (optional)

New York, New York

Tell us about your practice

You know who you serve and why you're the right advisor for them. Share that below — and we'll check whether your digital presence actually reflects it.

WHO DO YOU SERVE?

Describe your ideal client — their life stage, profession, or situation. Be specific.

HENRY - high income, not rich yet people who work in tech (companies like Amazon, Google, Meta and Walmart).

2-3 sentences is plenty.

WHAT MAKES YOU DIFFERENT?

Your fee structure, specialty, approach, or problems you solve that others don't.

Fiduciary with a focus on Life planning - everything from estate planning to tax planning to cash flow planning to college savings and how to generate income in retirement. Not JUST investments.

2-3 sentences is plenty.



Auditing your presence...

This takes about 30 seconds



- ✓ Reviewing your website
- ✓ Searching for reviews & social proof
- ✓ Scanning for media mentions
- ✓ Checking directory & LinkedIn presence
- ✓ Analyzing overall sentiment
- Summarizing results



STRONG VISIBILITY

AI VISIBILITY LIKELIHOOD

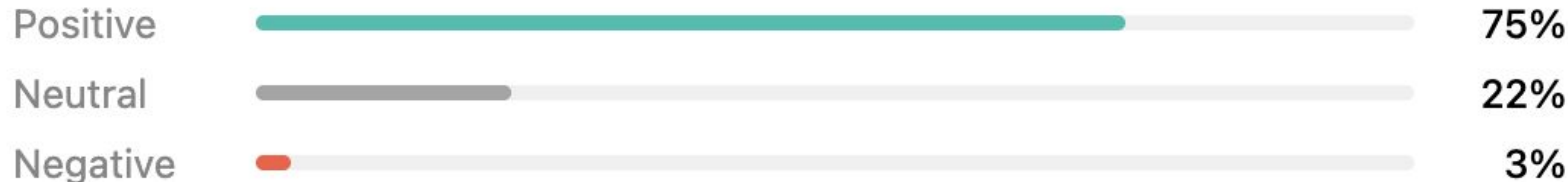
Gideon Drucker and Drucker Wealth have built an exceptionally strong digital footprint that positions them very well for AI discovery, particularly for high-earning tech professionals seeking comprehensive financial planning.

The firm has 85 Google reviews with a 4.9★ rating, which is excellent social proof. Gideon has earned substantial personal media coverage including Investopedia Top 100 recognition, Kitces podcast features, Authority Magazine interviews, and Women's Choice Award. The website clearly articulates their HENRY niche with tech company logos prominently displayed, though structured FAQ content could be expanded for better AI parsing.

THREE THINGS THAT WOULD IMPROVE YOUR LIKELIHOOD

- Add dedicated FAQ sections with schema markup addressing common HENRY and tech employee financial questions
- Create more indexed content specifically around equity compensation, RSU strategies, and tech employee benefits
- Develop additional bylined articles or podcast appearances that reinforce the HENRY/tech employee specialization

WEB SENTIMENT



Overwhelmingly positive signals from strong Google reviews (4.9★/85 reviews), prestigious recognitions (Investopedia Top 100, Forbes features), and clear value proposition. Minor neutral content from directory listings. Minimal negative risk from one ambiguous Yelp snippet mentioning 'scam' in an unrelated context.

✓ Google Business Profile

✓ Third-party reviews

✓ Press mentions

✓ Active social presence

✓ Directory listings

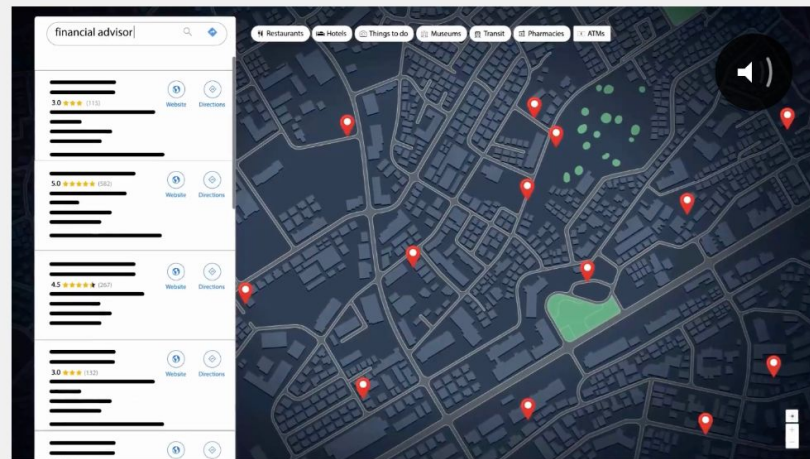
✓ Indexed testimonials

Just Launched: FMG TESTIMONIALS

[Products](#) ▾[Who We Serve](#) ▾[Pricing](#)[Resources](#) ▾[Company](#) ▾[Sign In](#)[20-Min Consult](#)

Let your clients do the talking

Trust has always mattered in financial services. What's changed is **where that trust gets formed**. Today, prospects decide who to call before they ever reach your website – based on reviews, testimonials, and what AI-powered search tools say about you. FMG Testimonials helps you turn real client experiences into visible trust that drives growth.

[Get Started](#)

Just Launched: FMG TESTIMONIALS

- **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**

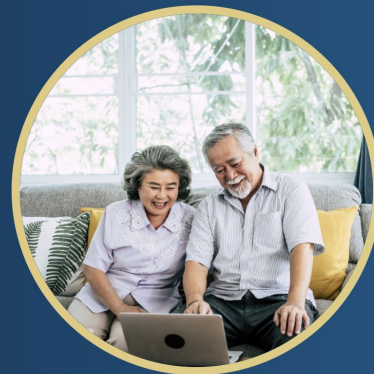
MISSION  WEALTH*

 [About](#) ▾ [Who We Serve](#) ▾ [Our Services](#) ▾ [Resources](#) ▾ [Contact](#) ▾

Mission Wealth Client Testimonials

Here's how we help people through real-life transitions.

Hear directly from our clients, explore their journeys, and connect with their stories.



LEAVE US A REVIEW

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.

★★★★★

Brian G.

Peter and Sara are a responsive and thoughtful team who I trust have my and my family's interest at heart.

★★★★★

William S.

Jacob Mortenson has been absolutely wonderful in helping us accumulate wealth in our portfolios. Thanks Jacob for all

★★★★★

Ellin T.

Wes Patton has consistently delivered excellent counsel, strategic direction, and personal investment structure

FMG Testimonials: Turning Client Loyalty into Digital Visibility

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. 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.

★★★★★

"Cinasis 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 is supporting our financial requirements."

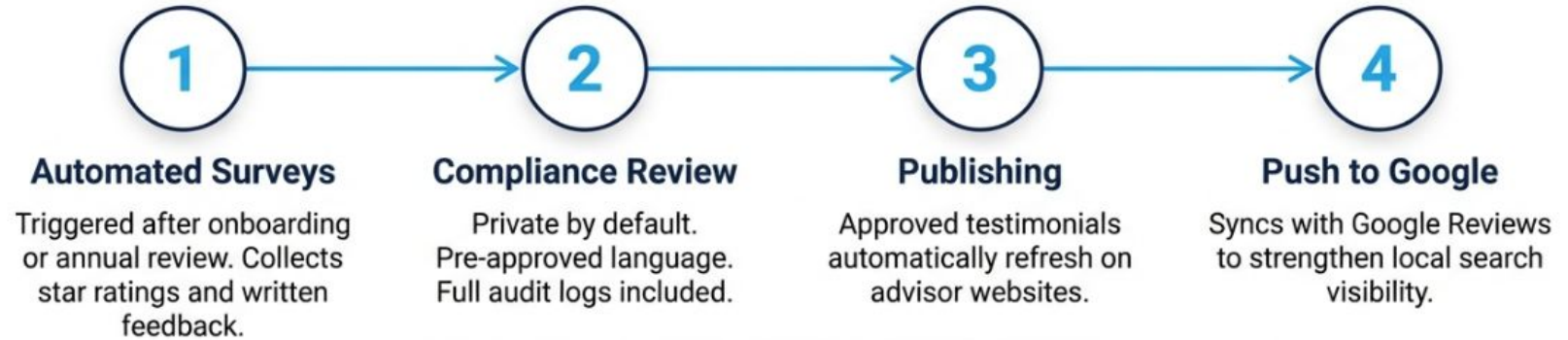
Margo G.

★★★★★

"Laela Erickson has been an amazing advisor. She comes and my spouse and I always realistic in dealing with the Edelman team's expert guidance. Love this ever changing economic environment."

A compliant system to generate and publish social proof.

FMG Testimonials: How it Works



The screenshot shows a web browser window with the title "fmG Feedback Form". Inside the browser, there is a white box with the "fmG" logo at the top. Below the logo is a five-star rating system with all stars filled. Underneath the stars is a text input field with the placeholder text "Tell us about your experience". At the bottom of the white box is a blue "Submit" button.

Automatically Update Websites



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.



POSITIONING ALIGNMENT

Aligned

Website clearly communicates HENRY focus with tech company logos (Apple, Google, Meta, Amazon, Microsoft, Spotify) prominently displayed, directly aligning with stated target audience

Aligned

Life planning differentiator is well-articulated on site ('everything from estate planning to tax planning to cash flow') and reinforced through media coverage

Aligned

Fiduciary positioning is clearly stated and supported by CFP®, AIF® credentials prominently featured

Gap

While equity compensation expertise is implied through tech company focus, dedicated content specifically addressing RSU/stock option strategies could strengthen AI responses for these queries

SCORE BREAKDOWN

Third-party reviews & social proof

23 / 25

Excellent firm presence with 85 Google reviews at 4.9★ rating. Additional validation through Investopedia Top 100, Women's Choice Award, and 'Best Places to Work in Money Management' recognition.

Earned media & third-party mentions

24 / 25

Strong coverage including Investopedia profile and Advisor Council membership, Kitces FASuccess podcast feature, Authority Magazine interview, Forbes, WSJ, CBS, PBS, USA Today, and Washington Post logos on site with verifiable coverage.

AI-ready website content

15 / 20

Clear mission statement, well-defined niche (HENRY/tech employees), comprehensive service descriptions, and credential transparency. Content could benefit from more structured, question-answering format for AI parsing.

FAQ & structured question content

8 / 15

Blog content exists and educational webinars are offered ('Wealth Builder webinars'), but no dedicated FAQ page or schema-marked Q&A content was found to help AI systems quickly extract answers to common questions.

Cross-platform consistency & local visibility

7 / 8

Strong presence across Google Business Profile, LinkedIn company page, Facebook, Instagram, Yelp, and SEC IAPD. Consistent NAP data and firm messaging across platforms. Knowledge graph present in search results.

LinkedIn profile quality

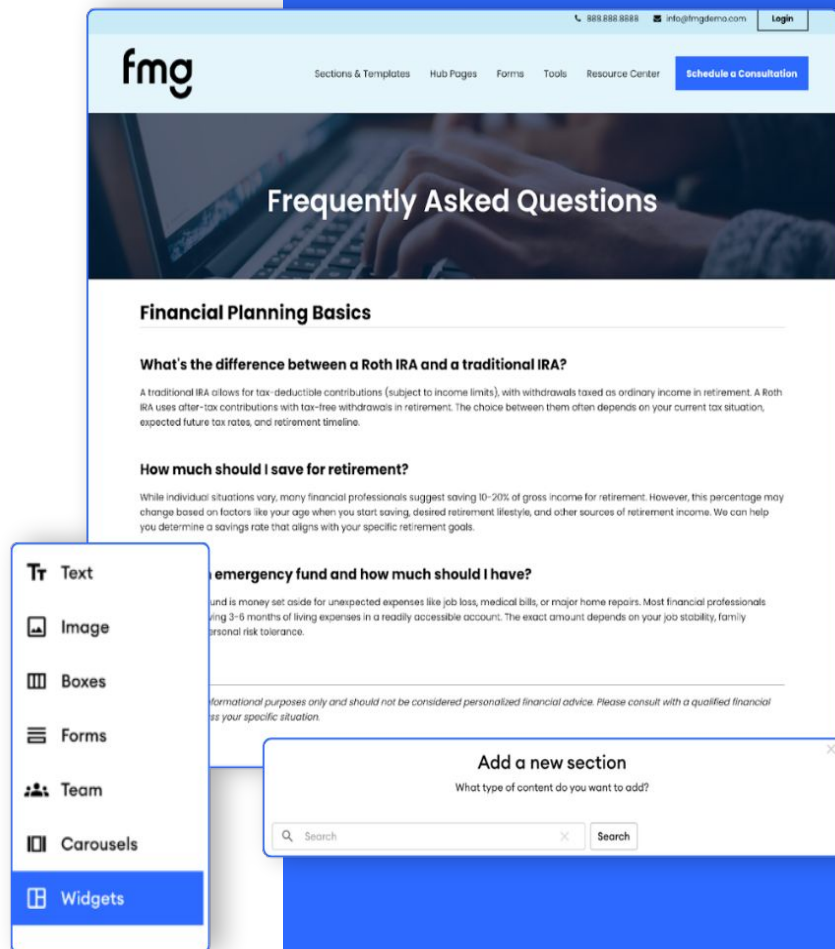
5 / 7

Gideon has an active LinkedIn presence with CEO title, credentials displayed, and engagement on posts about industry recognition. Company page is also active with regular content.

HOW FMG HELPS

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



Key Insight: Make sure you include text/transcripts of Videos, Podcasts, Awards

Get an Award?

Write up an article about it.

On a podcast or video?

Don't just embed it - include the transcript.

Want AI to “know” your firm for a specific reason?

Issue a Press Release

NEWS



Moneco Advisors' Charlie Rocco Named to 2026 Forbes | SHOOK Best-In-State Wealth Advisors List

Posted May 22, 2026

[Read More](#)



Moneco Advisors Welcomes Three Advisory Teams, Deepening its Partnership Model Across the Northeast

Posted May 5, 2026

[Read More](#)



Moneco Advisors' Stephanie Van Albert Named to Fairfield County 40 Under Forty by Westfair Business Journal

Posted April 10, 2026

[Read More](#)



PRIORITY ACTIONS

Quick win Add FAQ schema markup to existing service pages, structuring common questions about working with tech employees, equity compensation, and the Financial Life Plan® process

Quick win Create a dedicated landing page for each major tech company served (Google, Amazon, Meta, etc.) to capture specific equity compensation and benefits queries AI systems may receive

1–2 weeks Develop a comprehensive FAQ page addressing 15–20 common questions about HENRY financial planning, RSU strategies, and the firm's virtual planning model with proper schema markup

1–2 weeks Expand the book landing page ('H.E.N.R.Y. Strategies Unlocked') with more indexed content, chapter summaries, and key takeaways that AI systems can cite when answering HENRY-related queries

Ongoing Continue pursuing bylined articles and podcast appearances specifically focused on tech employee financial planning to strengthen topical authority in this niche

Ongoing Maintain the strong review velocity on Google Business Profile to keep social proof current and visible to AI systems

Even without your Score, Here's What You Can Do This Month:

Claim your Google Business Profile

Quick Win

Go to google.com/business. Claim, verify, add photo, hours, and specialty.

Rewrite your LinkedIn headline

Quick Win

Format: Name, Credential® | [Niche] for [Who] | [City]. Example: " Financial Planner for Tech Executives | Austin, TX"

Add an FAQ page to your website

Quick Win

10+ questions written how clients actually ask them. Answer in the first sentence. This is the highest-leverage content fix available.

Convert your media appearances to text

1–2 Weeks

If you have radio, podcast, or video appearances with no transcript — publish them. Audio AI cannot read; indexed text AI can cite.

Rewrite your About page for AI + humans

1–2 Weeks

Remove the credential list. Add: who you serve, what problem you solve, what makes you different. Make it first-person and specific.

Build your review presence across platforms

Ongoing

Start with getting testimonials - use Testimonial IQ to build a process that is compliant and automated. Then add to your marketing materials & website

Once AI sends someone, what converts the human?

You have 5 seconds. Here's what actually works.

Niche clarity above the fold

"I help tech executives in Austin manage RSU income" — not "We help families achieve their financial goals"

Social proof immediately visible

Real testimonials with context — not anonymous quotes. Prominently placed, not buried.

One clear call to action

"Book a 15-minute intro call" is better than 5 options. Remove friction. Link directly to scheduling.

FAQs that answer what they're thinking

"Do you have a minimum?" "Are you a fiduciary?" "How do you charge?" — answer before they have to ask.

Third-party credibility visible

"As seen in..." badges, award logos, media mentions — right on the homepage. These signal you've been vetted.

Fresh, specific, human-sounding content

A blog post from last month about the type of real situation your clients face. Proof you're active and engaged.

AEO Strategy is Centered Around 3 Pillars:

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
- Ability to push testimonials to Google Reviews
- "Indexed By AI" 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:

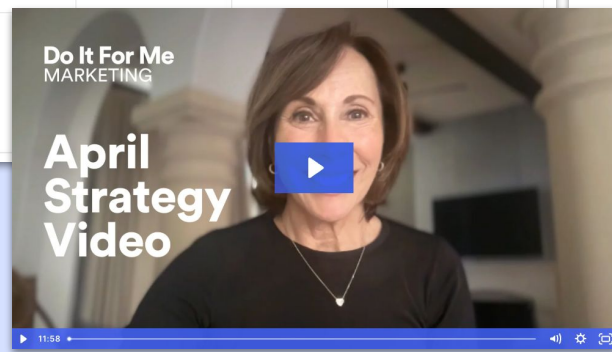
- ❖ Schema Markup
- ❖ Summary Boxes at Top
- ❖ FAQ pages
- ❖ FAQ sections within pages
- ❖ Content Formatted Q and A style (headers, titles)



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

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	1 O: April Fools' Day	2 B: Teaching Teens and ... E: What a \$5 Frappuccino... S: Financial Literacy Mo...	3 S: Teaching Young Adul...	4 S: National Stress Awar...
5 O: Easter	6 O: National Autism Awa...	7 A: Monthly Market Insig...	8	9 S: How Much Will Health...	10 S: National Siblings Day	11 S: National Pet Day
12	13	14 B: When Should I Start T... S: Making the Right Call...	15 E: When to Consider Ta...	16 S: Caring for Aging Pare...	17	18
19	20 A: Video of the Month	21 S: Administrative Profe...	22 S: Take Your Child to W...	23	24	25
26	27 S: What is Tax-Loss Har...	28				



Do It For Me
MARKETING

Hi there!

Below is your **April 2026 Do It For Me Marketing Calendar**, along with a video from Susan Theder providing a summary of the strategies and highlights. As always, these are each thoughtfully written for you by our most senior thought leaders and reflect your feedback and suggestions. Our goal is to provide you with blogs, emails, and social posts that set you apart from the competition and impress your clients and prospects. We welcome your edits, comments, and suggestions for future months and look forward to executing these on your behalf so you can sit back and relax, knowing your marketing efforts are hitting on all cylinders!

[Click Here to view your April calendar and Video](#)

[As a reminder, you are automatically opted-in to all the monthly content](#)

Sincerely,

or DIFM Marketing Team

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

Book a 20-minute consult →

Questions? Marketing@fmgsuite.com

