



LIVE WORKSHOP

AEO Website Workshop

Get Found by AI.

Get Chosen by Prospects.



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Discovery

G ChatGPT
GPT-4o

Who should I consider as a financial advisor if I'm retiring in 3 yrs in the St. Louis area?

ChatGPT

For retirement planning near St. Louis, look for fee-only CFPs who specialize in retirement income planning.

Advisors often mentioned:

- Meridian Wealth Partners
- Cornerstone Financial
- Your firm? Not found.

Ask anything...

Evaluation

C Claude
Anthropic

Look at this advisor's website. Are they a good fit for someone retiring at 62?

Claude

Based on their website, here's my assessment:

Strengths

- Fee-only, fiduciary stated
- CFP credential visible

Gaps found

- No client reviews online
- No retirement specialty content on site
- Last blog post: 14 months

Ask anything...

Selection

G Gemini
Google

Compare Cornerstone Financial vs. Meridian Wealth for my situation.

Gemini

	Cornerstone	Meridian
Fee type	Fee-only	Fee-only
Reviews	47 Google	None found
Specialty	Retirement	General
Media	Forbes, KMOX	Not found
Content	Updated wkly	14 mo. ago

Gemini recommends:
Cornerstone Financial

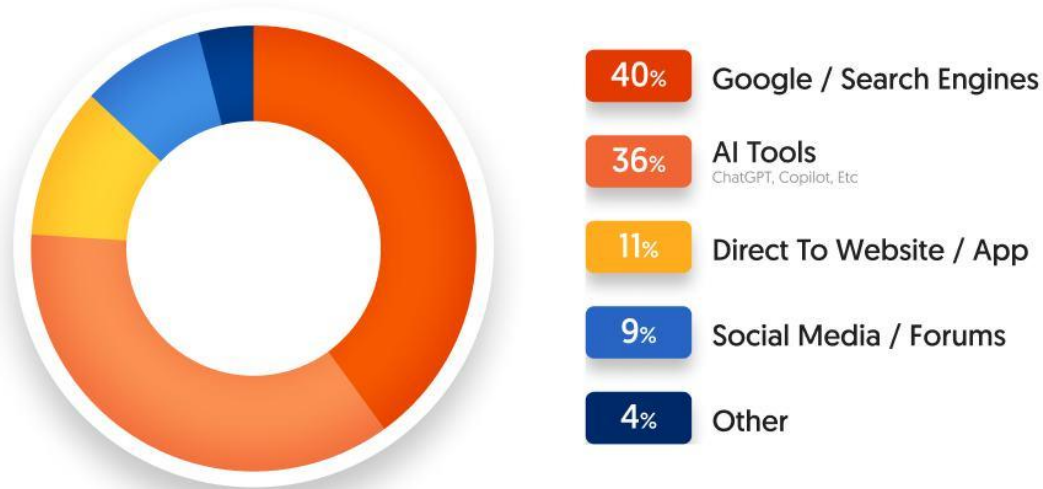
This happened before they ever visited a website.

Ask anything...

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

Search And AI Insights

Where People Get Answers Today

**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.

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The way your prospects research and discover has changed

36% of people are already getting answers from AI tools — not Google.

87%

of U.S. businesses don't appear in AI search results

RankOS Benchmark, 2025

70+%

of Google searches end without a click

Similarweb, 2025

3x

higher AI citation rate for businesses on review platforms

SE Ranking, 2025

85%

of AI citations come from third-party pages — not your website

AirOps, 2026

If you're not visible to AI, you're missing a third of your potential audience.

Your website now has two audiences.

Most financial advisors are still building for only one.



Audience 1: The Robots

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

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 lands on your page, you have **<5 seconds.**

They need to instantly see that you understand 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.

01

Why this matters now

The shift from Google to AI — and what the data actually shows about how prospects find advisors today.

02

The two-audience framework

What AI tools scan for, what humans need to see, and why they require completely different signals.

03

What AI is looking for on your site

The exact signals — reviews, content, FAQs, media, consistency — that determine whether AI recommends you.

04

What converts the humans who arrive

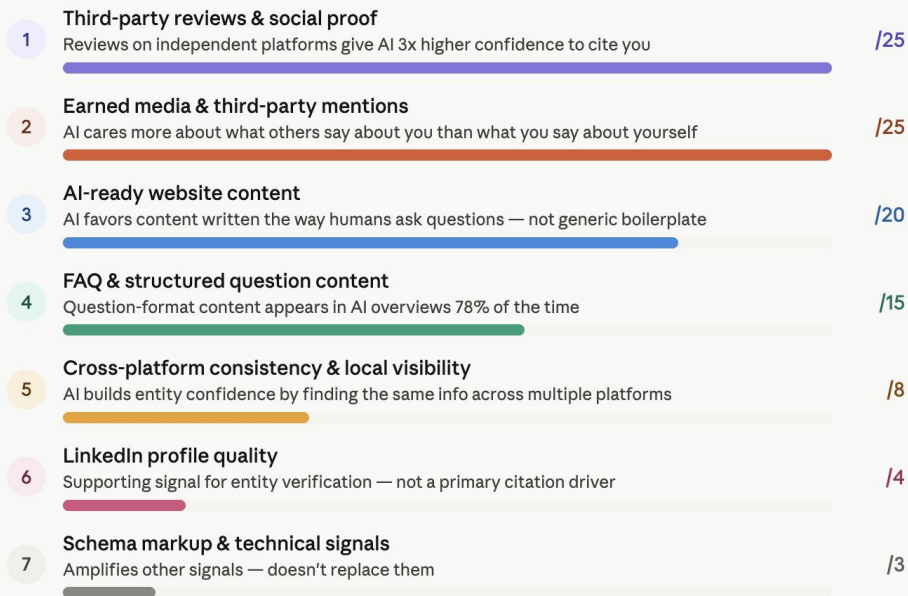
Once a prospect lands, what makes them book a call vs. bounce. Real advisor examples.

05

Live AEO audits + your action list

We audit real advisor websites in real time and give you a prioritized list of updates to make this week.

What AI is actually scanning for.



Total AEO visibility score

/100



This category accounts for 25% of your AEO score — because it's what AI trusts most.

Reviews & Social Proof — 25 pts

- ✓ Public eviews (specific + recent)
- ✓ Reviews Added to Website
- ✓ TestimonialIQ — published and indexed
- ✓ Reviews mention outcomes, not just praise
- ✓ BrokerCheck — no gaps or issues

What Our Clients Are Saying About Our Planners
Real experiences from real clients who trust us with their financial future.

<p>Ed B. ★★★★★</p> <p>"We have had a great experience with Andy Smith. We immediately felt comfortable with him. We believe he is trustworthy and very knowledgeable about how to help us navigate our finances and retirement. And he's funny, that's really important. Finances are such a heavy issue."</p>	<p>Michael M. ★★★★★</p> <p>"Cimale is like a member of our family! We so appreciate her knowledge, her helpfulness, her professionalism, her availability and her care!"</p>	<p>Dorothy V. ★★★★★</p> <p>"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."</p>	<p>Alexander R. ★★★★★</p> <p>"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 her supporting our financial requirements."</p>	<p>Marg ★★★★</p> <p>"Jason and I are always i our goa strategi- this eve environ</p>
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Edelman Financial Engines requests that current clients share their experiences. No compensation is paid for their testimonials and EFE does not control the content. Comments may have been edited for brevity and clarity. The experience described may not be the experience of all clients and is not a guarantee of future performance or success.

Key insight: If an advisor has a radio show or podcast with no written transcript online — AI cannot access it. Converting audio to indexed text is one of the highest-leverage fixes available.

The difference between what AI can cite — and what it ignores:

✗ AI CANNOT CITE THIS

"We help clients achieve their financial goals through personalized planning. Our team is passionate about serving families at all stages of life. Contact us today to start your journey."

✓ AI CAN EXTRACT AND CITE THIS

"Should I take Social Security at 62 or 70?"

For most physicians in their 50s with a spouse still working, waiting until 70 adds \$2,200/month in lifetime income. Here are the 3 questions that actually determine the right answer for your household."

FAQ CONTENT — 15 pts | FAQ pages appear in AI Overviews 78% of the time

Write questions exactly how clients ask them

"Can I retire at 55 if I have \$2M saved?"

Answer in the first sentence — don't build up to it

"Yes — but it depends on 3 factors specific to your situation."

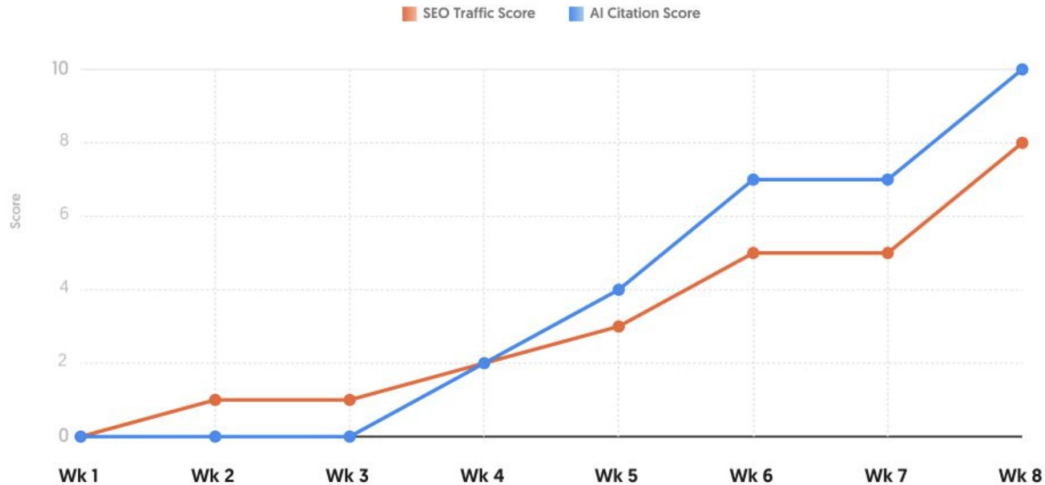
10+ questions per page minimum

Address fees, process, fiduciary status, who you help, minimum investments

Make it Crystal Clear who AI Should Send to You

The more specific, the better

Time To See SEO Results Vs. LLM Citations

**WHAT TO DO NEXT:**

SEO and GEO are both important, but **you can see faster results** on the GEO front.

Source: NP Digital — Apr/2026. Data from 20 websites running SEO and GEO campaigns simultaneously.

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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.

Live AEO Audits.

Let's look at real advisor websites — in real time.

We'll look at sites live, explain the findings, and show exactly what to fix first.

Submitted your site? You might be next.

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

This is your window.

The advisors building the right digital signals now will be the ones AI recommends six months from now.



Work on Improving Your AEO

Start with Testimonials & Optimizing Your Website for AI



Book a consultation

20 minutes with our team. We'll review your digital presence together and talk about what fixes you need.



Try FMG's tools to Improve AEO

AEO-friendly websites, FMG Testimonials, and AI-ready, compliance-ready content. All built for advisors.

People Connect With People.



Build your brand,
Find your fans, and get found by AI.

fmg

Want to keep growing?

Download Our AI Guide

Everything covered today, in one doc

Book a 20-min consultation

We'll look at your profile together

Try FMG's Do It For Me

Content posted, compliance-ready