



LIVE DISCUSSION:

Think You Don't Have a Niche? You Actually Have Several

SPEAKERS



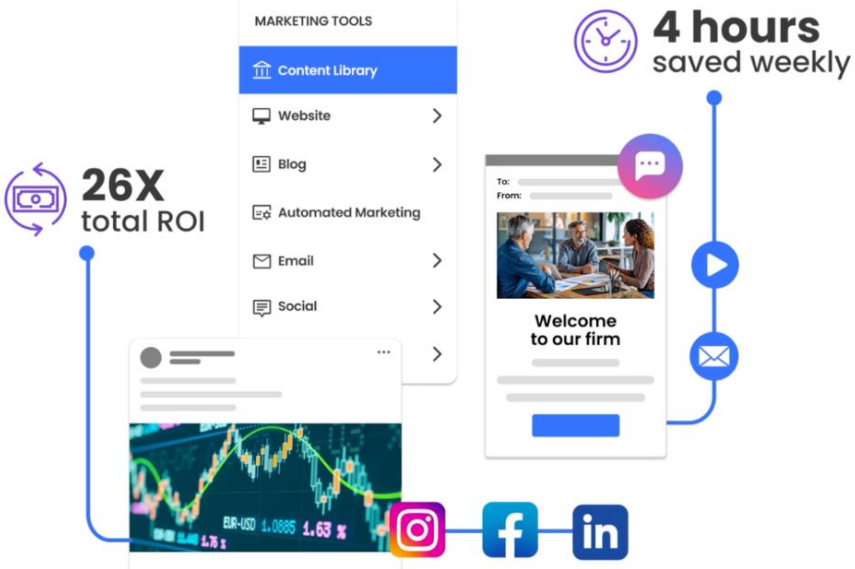
Samantha Russell
Chief Evangelist



Susan Theder
CMO & CXO

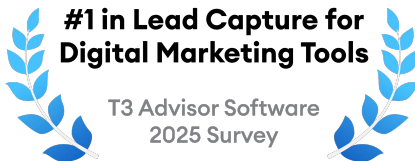
The All-in-One Digital Marketing & Compliant Texting Solution

Whether you're a financial professional, RIA, or large enterprise, we provide marketing solutions that boost performance, save you time, and deliver measurable results—empowering you with the right tools to grow and thrive.



Who Is FMG? An award-winning marketing suite.

Built just for you.



Our expertise is **showing off yours.**

fmg

The way your prospects research and discover has changed

Discovery

What should I look for in a financial advisor for someone with \$5M+ in assets?

Key advisor qualifications

For high net worth clients, these credentials and structures matter most

Factor	Why it matters
Fee-only / fiduciary	Legally required to act in your interest, no commission conflicts
CFP® or CFA®	Rigorous credentials in planning or investment analysis
Tax & estate	Essential at



...

Evaluation

I have concentrated stock from an IPO and rental properties. What should I ask advisors?

Your situation involves concentrated equity risk and real estate — targeted questions:

Topic	Ask this
Concentrated stock	What strategies do you use for diversifying a single-stock position?
Real estate	How do you incorporate illiquid assets into overall allocation?
Fee structure	What is your all-in cost, and does the fee decline



...

Selection

Compare these 2 advisors for my situation.

	Firm A (boutique RIA)	Firm B (family office)
AUM fee	0.75%, drops above \$5M	0.85% flat includes family off svcs
Minimum	\$2M	\$5M
Tax planning	Coordinates with your CPA	In-house CPAs & estate attorneys
Stock plans	Partners with options specialist	Direct 101 manager
Reporting	Quarterly	Real-time portal



...

In the world of AI Search, an ICP is more important than ever

YOU'RE PROBABLY THINKING...

"I don't have an ICP. I serve high-net-worth families with complex planning, tax, and estate needs. That's pretty much everyone with money."

HERE'S THE REFRAME

Your firm serves all kinds of families. Your marketing can't. ICPs are for marketing purposes, not service purposes.

This step has three pieces

Your ICP and entry points

Most successful RIAs serve broad HNW. So you need entry points: the moments and life events that bring HNW families to you in the first place.

Your value prop

If you can't say in one sentence what makes you different, your clients can't refer, your COIs can't position you, and your content can't stand out. AI definitely won't know who to send your way.

Your conversion infrastructure

Website that converts in 30 seconds. CRM that captures leads. Sub-5-minute response time. Skip this and every lead leaks out.

So who's MY ICP?

Ask yourself: What was the triggering event that made them walk in the door?

Your ICP is not who your clients ARE today. Your ICP is the **pain point** they have in common that made them reach out. .

Common entry points (where your top clients came from):

- ✓ Liquidity event: business sale, IPO, RSU vest
- ✓ Death of a spouse or parent
- ✓ Divorce: financial life rebuild
- ✓ Job change with equity package decisions
- ✓ Real estate sale, especially primary residence
- ✓ Inheritance: just received \$5M+
- ✓ Caring for an aging parent (sandwich generation)
- ✓ Concentrated stock exposure from job comp
- ✓ Approaching retirement (3-5 years out)
- ✓ Becoming a business owner (practice purchase)

Example:

MID-CAREER PROFESSIONALS

- [GOOGLE EMPLOYEES](#)
- [AMAZON EMPLOYEES](#)
- [META EMPLOYEES](#)
- [WALMART EMPLOYEES](#)

How do I know if I am a good fit?

We deliver the greatest value when we focus on comprehensive planning that requires our exper

Our typical clients are:

- Aged 35-49 with income over \$300,000.
- Focused on minimizing current & future tax bill and would like tax planning & tax prep integrated into the wealth management program
- Are contemplating how to best fund their children's education, while thinking about buying a larger home, or spending more on vacation while wanting to make sure they're on track for retirement...while (well, you get the idea!)
- Ready to align investments with their goals, investment time horizon, and stage of life
- Have targeted financial goals to plan for and build around
- Work in big tech/media where RSU's make up a meaningful part of your total compensation
- Diligent Savers that can save \$5,000 month
- One spouse might have 1099 income or a small business & they need help understanding how to maximize their self-employment income & selecting the most appropriate retirement plan for themselves
- Need help putting together an estate plan for their growing family

Example:



AURA LEGACY

[About Us](#)

[Our Approach](#)

[Who We Serve](#)

[Resources](#)

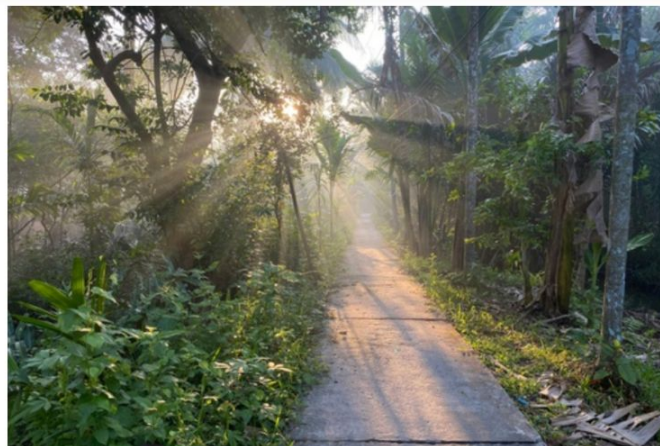
[Request an Appointment](#)

When To Begin Your Journey With Us

Clients often reach out during moments of transition or responsibility, including:

- A career change or advancement.
- Divorce or separation.
- Executives receiving equity ownership
- Caring for aging parents.
- Receiving or inheriting wealth.

These moments can bring uncertainty, yet they also create an opportunity to pause, organize, and move forward with intention.



Most firms claim three ICPs they can't actually fund.

Pick fewer ICPs. Treat each one like the only thing that matters.

1 Three is the max. One is best to start.
If you have five 'ICPs,' you have no ICPs. You have a list of demographics. Three is the operating ceiling. One is right for a firm that's never done this.

2 Each ICP needs its own everything.
Three ICPs doesn't mean three bullets on the about page. It means three landing pages, three content streams, three COI lists, three follow-up sequences.

3 ICPs are additive, not parallel.
Nail one ICP first (12 to 18 months). Prove it works. Then layer in the second. Trying to build three at once means none compounds.

4 Share infrastructure, not messaging.
Your CRM, tech, and team can serve multiple ICPs. Your homepage, content, and COI strategy can't serve 'everyone' without becoming forgettable.

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.

Are you Invisible to AI? Find Out

- 1 Third-party reviews & social proof** /25
Reviews on independent platforms give AI 3× higher confidence to cite you

- 2 Earned media & third-party mentions** /25
AI cares more about what others say about you than what you say about yourself

- 3 AI-ready website content** /20
AI favors content written the way humans ask questions — not generic boilerplate

- 4 FAQ & structured question content** /15
Question-format content appears in AI overviews 78% of the time

- 5 Cross-platform consistency & local visibility** /8
AI builds entity confidence by finding the same info across multiple platforms

- 6 LinkedIn profile quality** /7
Supporting signal for entity verification — not a primary citation driver


Total AEO visibility score

/100

80–100
Strong visibility

60–79
Moderate visibility

40–59
Limited visibility

0–39
Invisible to AI

What AI is actually scanning for.

✗ 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."

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).

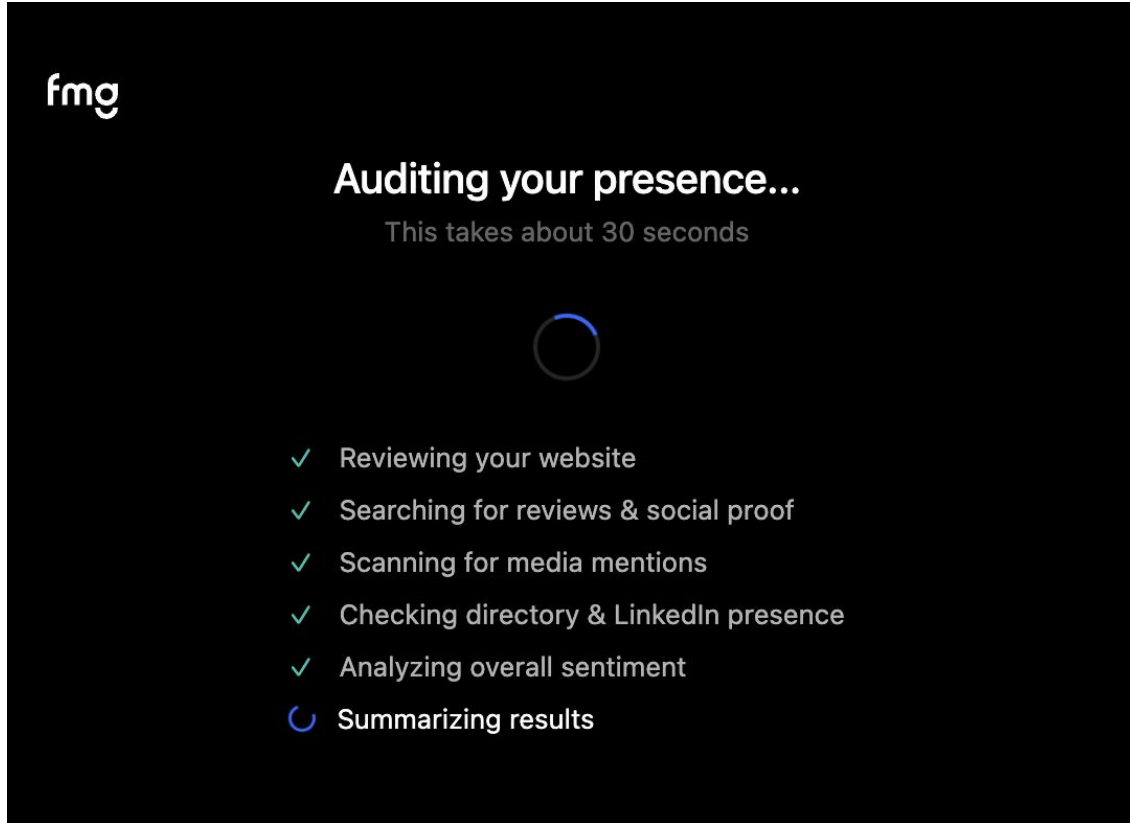
2-3 sentences is plenty.

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.



The screenshot shows a dark-themed interface for the FMG AEO Score Tool. In the top left corner is the 'fmg' logo. The main heading is 'Auditing your presence...' in a large, bold, white font. Below the heading is the text 'This takes about 30 seconds' in a smaller, lighter font. In the center of the screen is a circular progress indicator consisting of a thin blue ring. Below the progress indicator is a list of six items, each preceded by a checkmark icon. The first five items have green checkmarks, and the sixth item has a blue checkmark, indicating it is the current step in the process.

fmg

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

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.

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

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

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	1 O: April Fools' Day	2 B: Teaching Teens and ... E: What a \$5 Frappucci... 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				



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,

for 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

