How Testimonials Turn Client Trust into AI Visibility & Growth

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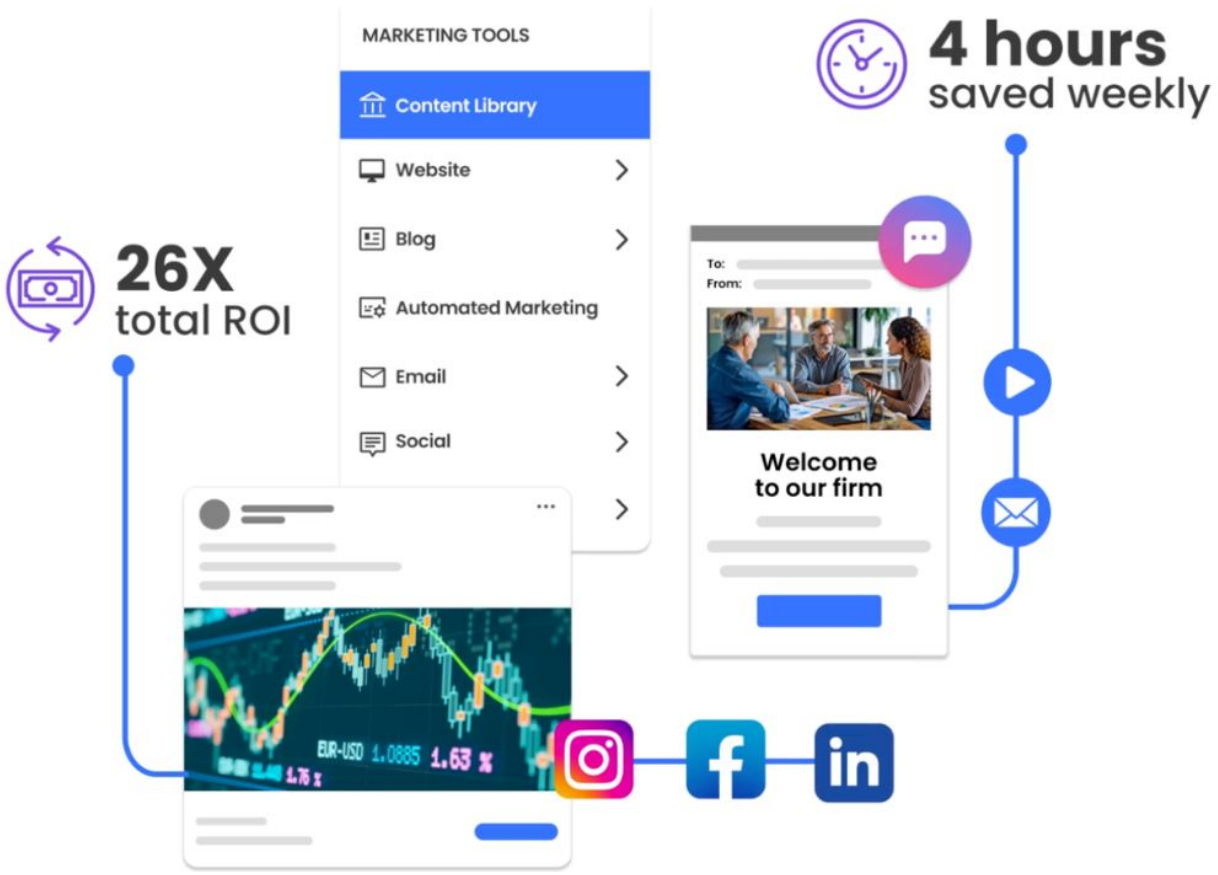
Your partner for **what's next in advisor marketing.**

FMG helps you keep pace with how clients discover and choose advisors, with the flexibility to build one connected platform or use only the solutions that fit your business.

See How it Works



One Platform For Every Part of Your Marketing

The FMG product suite.

01	CONTENT & ENGAGEMENT	**Marketing Suite**	Keeps you visible and consistent. Email, social, content, and automations, all compliance-ready.
02	DIGITAL PRESENCE	**Website Suite**	The foundation. Where prospects validate, referrals land, and AI search surfaces your expertise.
03	CLIENT TEXTING	**Messaging Suite**	Lets you text clients compliantly. Built for financial advisors, modern new mobile app.
04	MANAGED EXECUTION	**Do It For Me**	Removes the execution burden. A dedicated Concierge runs marketing month after month.
05	TRUST & SIGNALS	**Testimonials**	Compliant reviews and social proof, built into the platform and surfaced on websites and Google.
06	CONTENT MARKETPLACE	**Institutional Intelligence**	Carrier, asset manager, and association expertise published in the your voice.
07	PARTNER PROGRAM	**FMG Connect**	Integrates with all your preferred solutions saving you time and improving execution.

One login · Built in compliance workflow · CRM integrations · Built only for financial advisors

A few housekeeping notes

1. **This session is being recorded**

   A replay will be available afterward if you need to step away or want to revisit it.

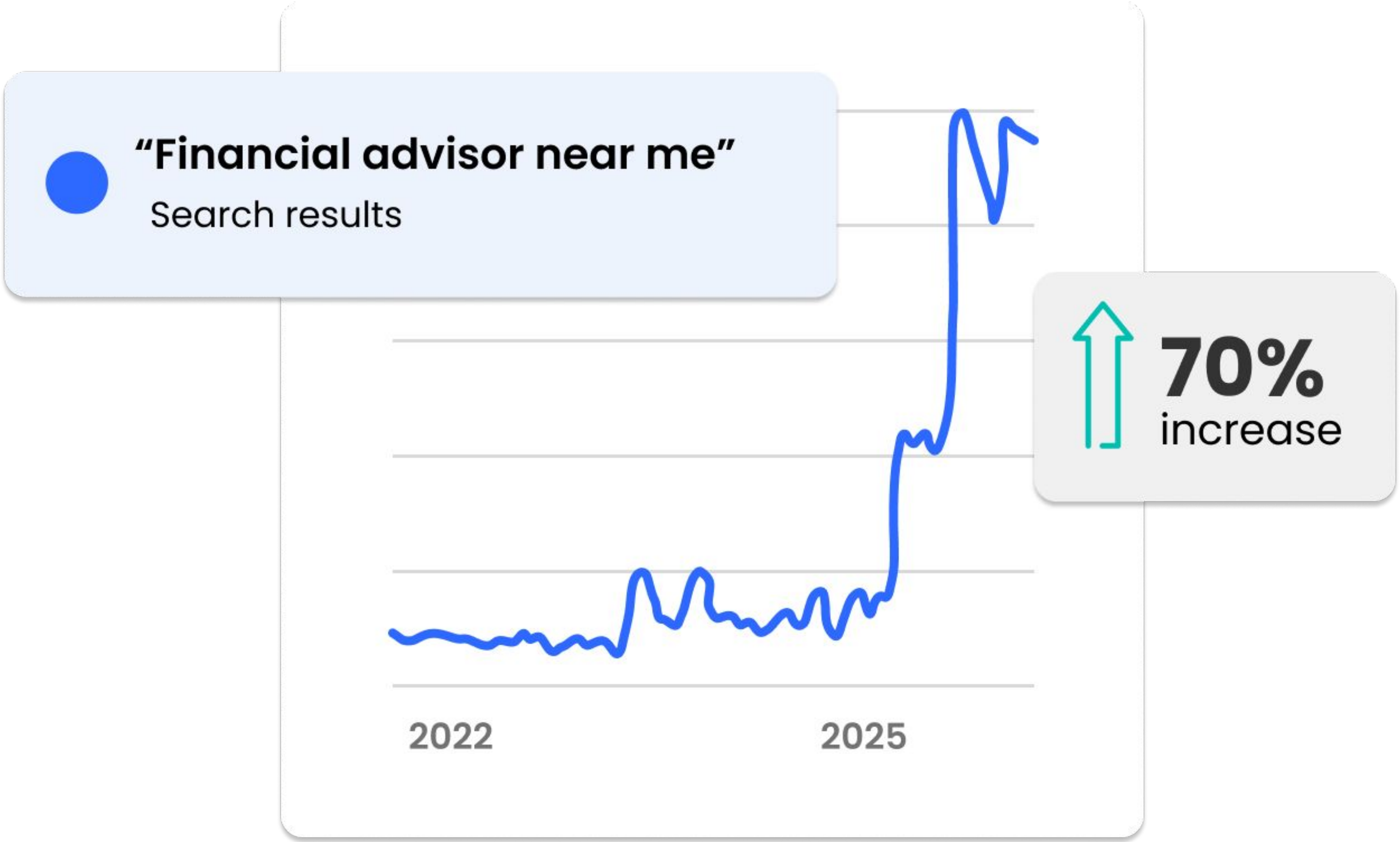
2. **We'll share the slides**

   The presentation deck will be sent out along with the replay link.

3. **Plus a look at FMG Testimonials**

   We'll include an overview of FMG's testimonials solution for anyone who wants to explore it further.

People are searching for advisors more than ever



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NP digital

Search And AI Insights

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.

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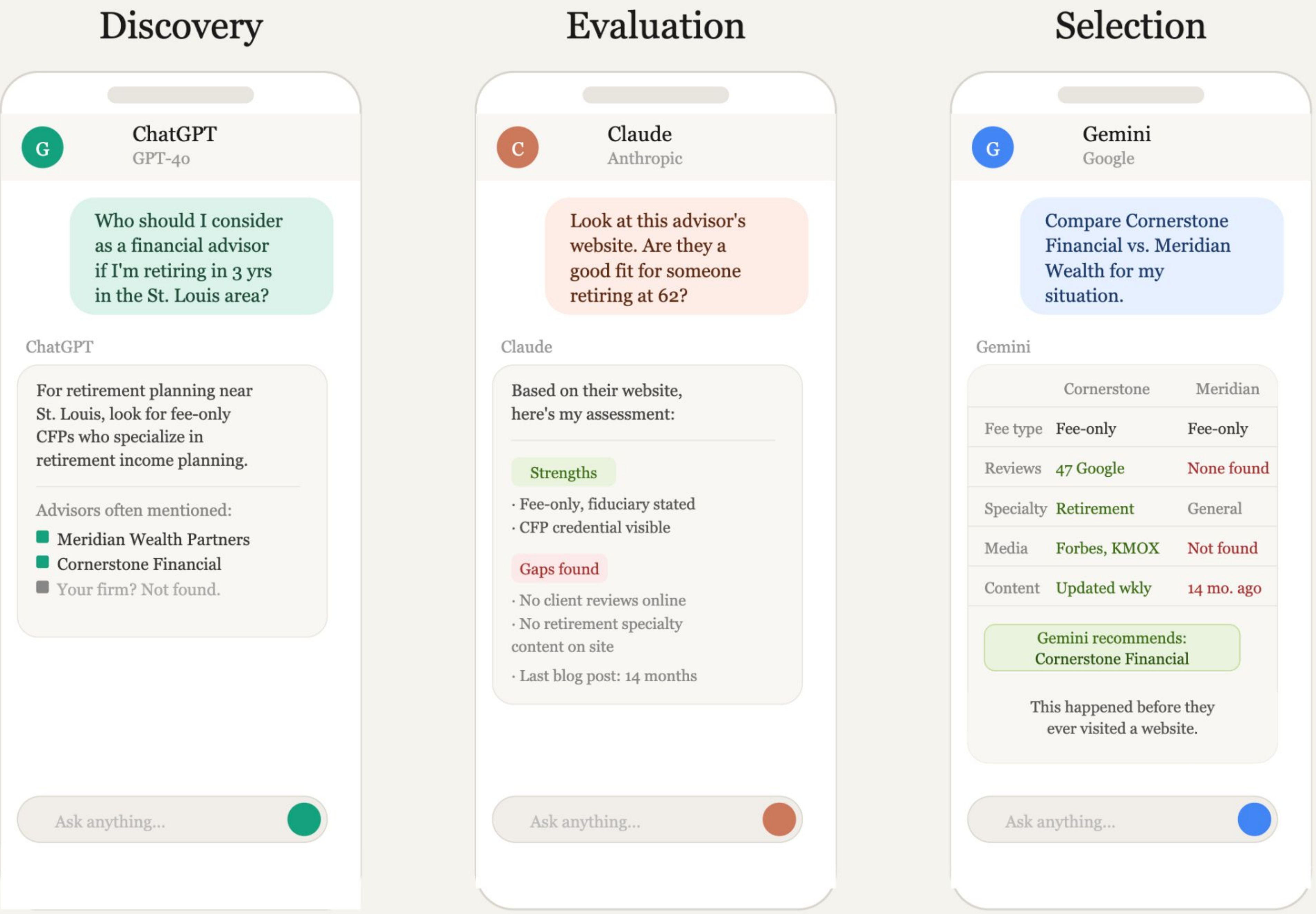

Your next client is already doing this. The question is whether AI can find you.

How does AI decide WHICH firm to recommend?

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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	60–79	40–59	0–39
Strong visibility	Moderate visibility	Limited visibility	Invisible to AI

3 Main Pillars to Improve Your AEO Score

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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

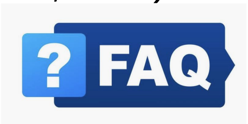
How FMG Solves for This:

- 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

WHAT WE'LL COVER

If you've been sitting on the testimonial opportunity because it felt too risky, this session is for you.

1

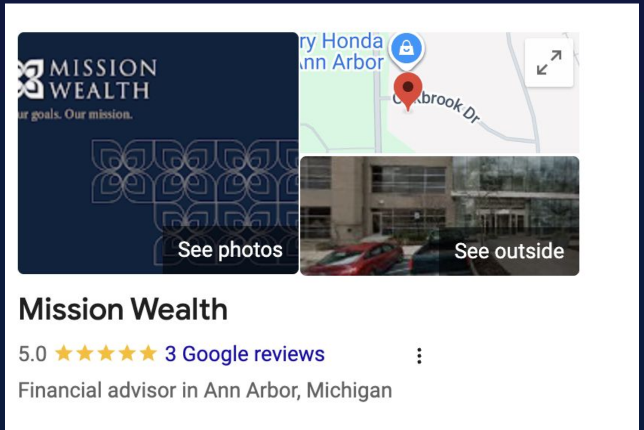
Turn reviews into proof

Provable, compliant, and working for you and your advisors across search, AI, and referrals.

2

Maximize impact

Across websites & Google Business Profiles to make testimonials a real marketing tool

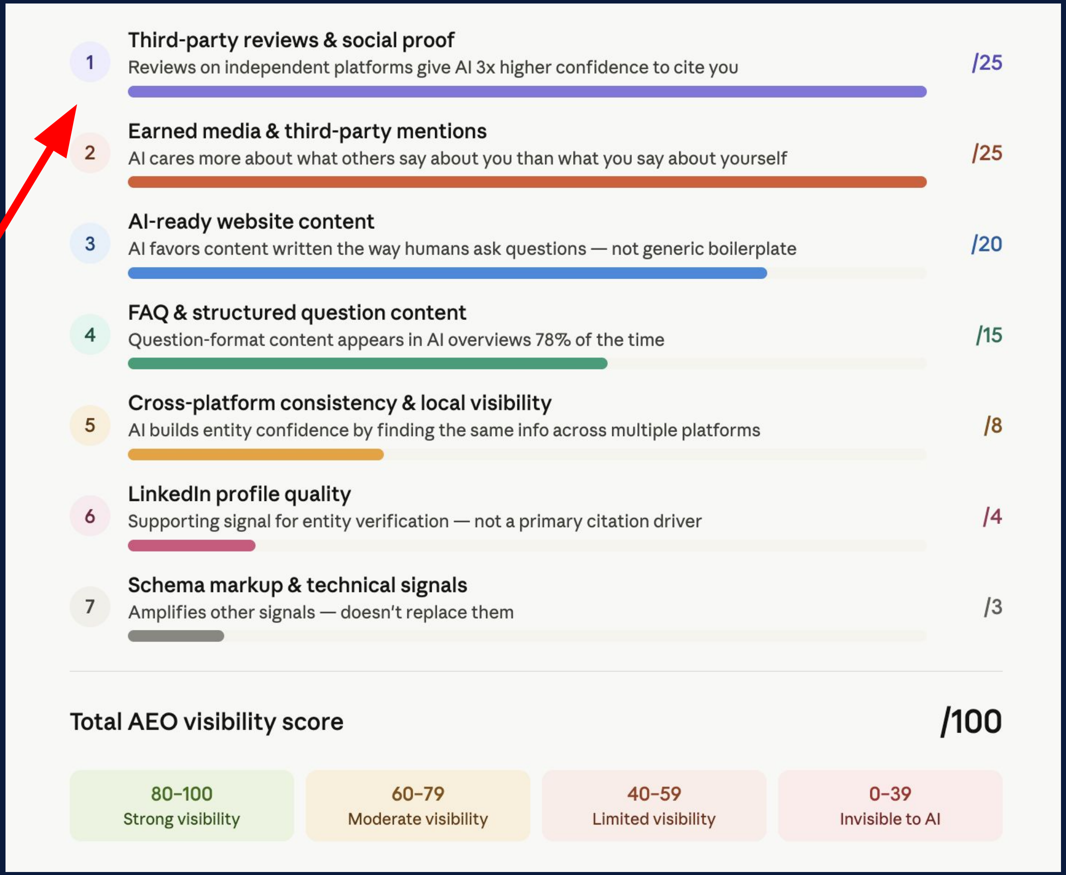


In 2021

The SEC cleared client testimonials for RIAs

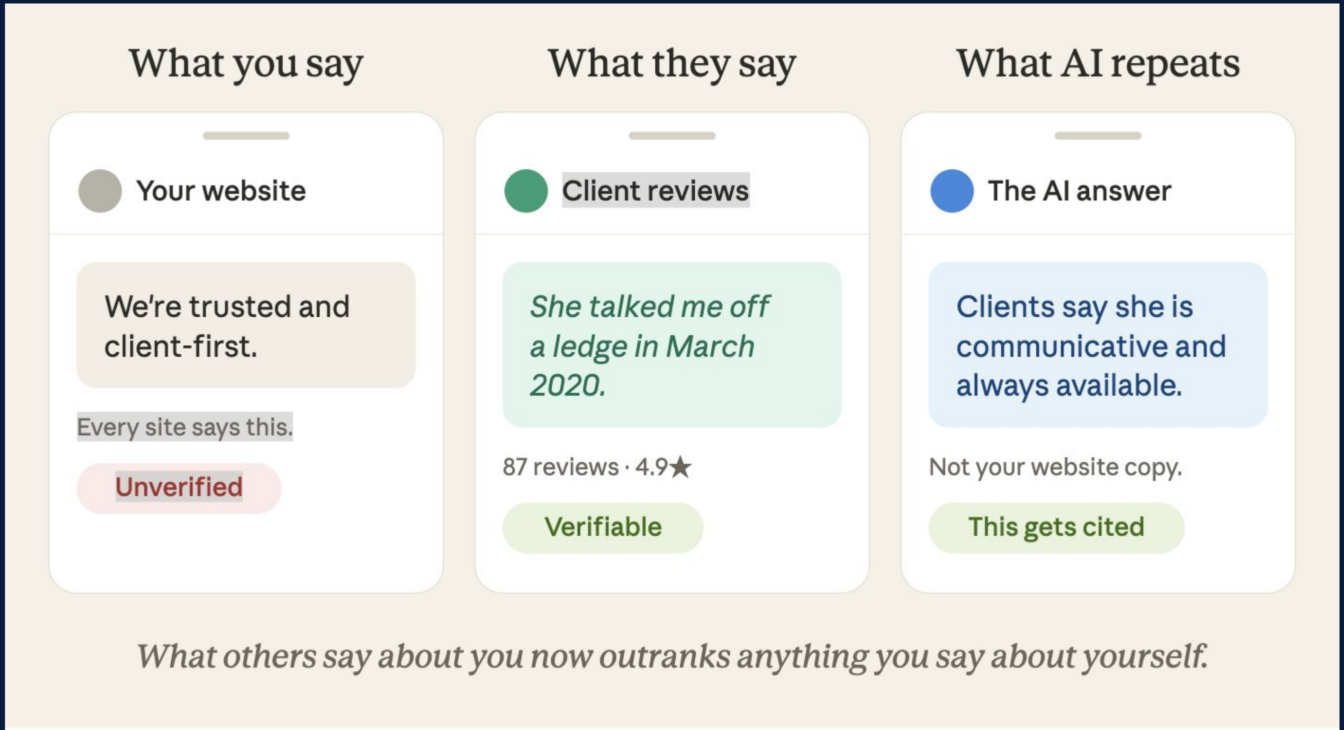
But most of you watching this still aren't collecting them.

That's a big problem, because client reviews are now one of the strongest signals determining whether AI tools and search engines recommend a firm to a prospect at all.



WHY NOW

What other people say about you now carries more weight than anything you say about yourself.



AI tools and search engines increasingly treat client reviews as the trust signal

MISSION WEALTH®

🗣️255

testimonials collected

✅ 205

testimonials approved

📍 48

locations represented

⭐4.98

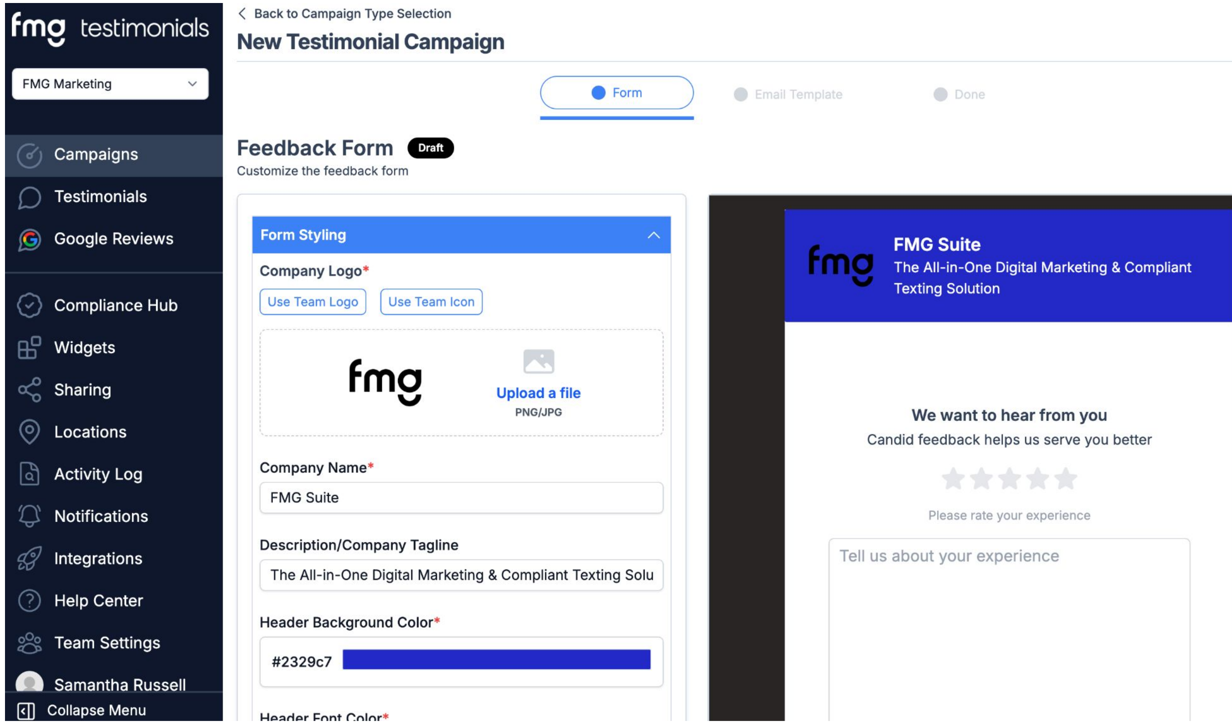
Average rating

How? They worked with FMG Testimonials on a system to collect reviews at scale — and put them where they generate growth

Just Launched This Year: FMG Testimonials!

Why 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**



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How it Works

Marketing owns execution. Compliance owns the rules. The process runs in one system.

Outreach

Marketing sends campaigns to client lists.

Consent

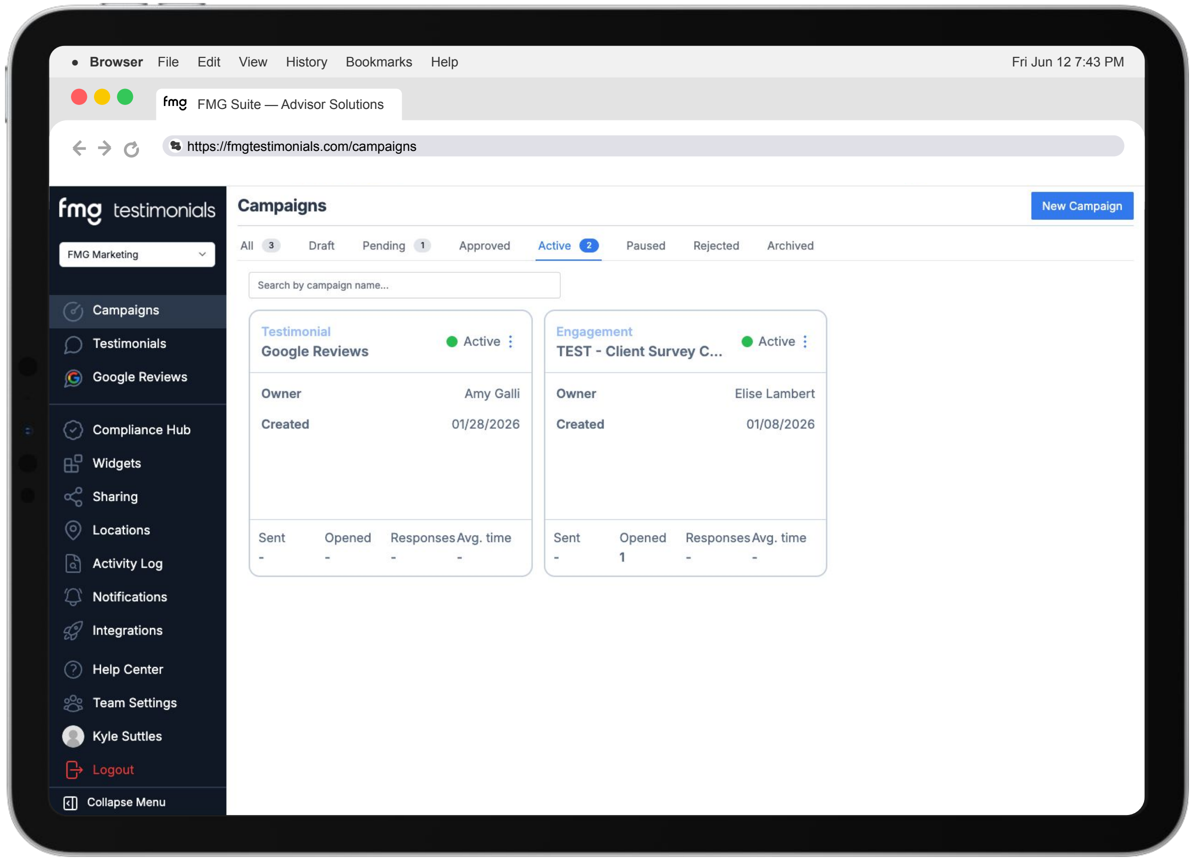
Opt-in is captured and logged.

Review

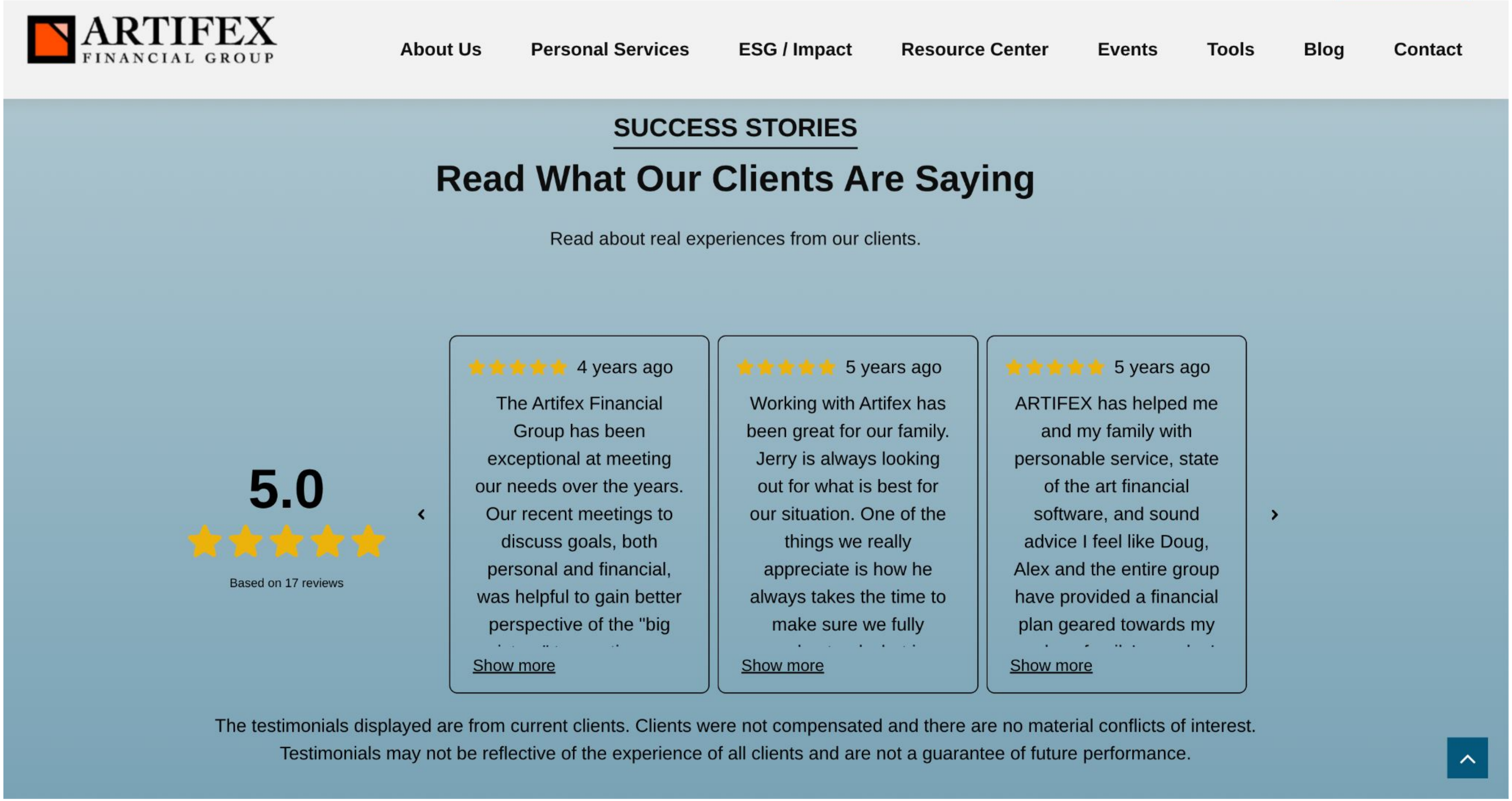
Each submission routes to the home office queue.

Publish

Approved proof goes live on public website and advisor pages.



Automatically Update Websites



7 Day System To Start Getting Testimonials

DAY 1
Admin
Update Form ADV & ensure your firm allows testimonials

DAY 2
Compliance
Partner with compliance on approach & disclosures

DAY 3
Write
Draft feedback email with approved language

DAY 4
Share
Send to clients — after onboarding or annual reviews

DAY 5
Review
Review incoming testimonials for quality & compliance

DAY 6
Publish
Create & approve testimonial website content

DAY 7
Promote
Share testimonials with prospects & push to Google

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

ENTERPRISE CONTROLS

Branding, data handling, and access are set at the account level, not by individual advisors.

Brand-level identity

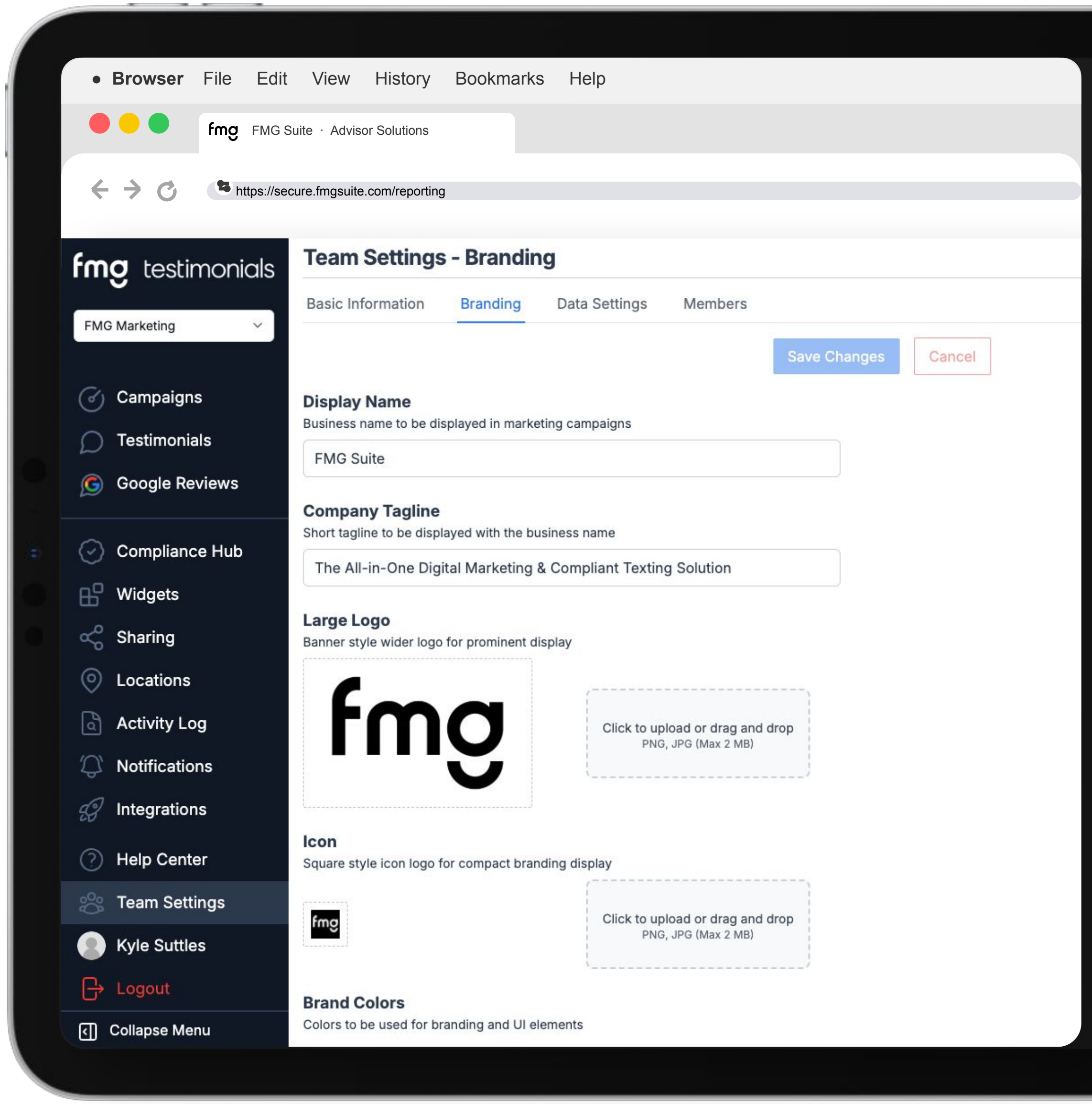
Business info, branding, and website set at the account level and applied everywhere.

Data settings

How the account's data is configured and handled, controlled in one place.

Member management

Add, remove, and assign roles so the right people have the right access.



Example:

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- Advisor email signature lines
- Non-advisor email signature lines
- Post-client-event thank-you emails
- Quarterly newsletters
- Post-webinar/online-event drip campaigns

- **KEY FOR COMPLIANCE:** Able to prove in an audit that you are fair and balanced and everyone has access to leave a review.

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WHAT MISSION WEALTH BUILT

MISSION WEALTH®

Kyle Buffo

CFP®

Client Development Advisor in

Based in Lisle, Kyle is often the first person prospective clients meet at Mission Wealth. He helps people exploring financial advice or considering a change determine whether Mission Wealth may be the right fit and connects them with the advisor and team best suited to their needs.

WAYS TO CONNECT

- In-person visits
- Video Meetings
- Phone Meetings

REQUEST AN INTRODUCT

WHO KYLE TYPICALLY HELPS

Individuals and families exploring a relationship with Mission Wealth, people considering a change from their current financial advisor, prospective clients with complex or interconnected financial needs, people unsure which advisor or planning support they need, families seeking a coordinated advisory team with specialized expertise.

SERVING PROSPECTIVE CLIENTS IN

All 50 States

QUESTIONS KYLE HELPS ANSWER

- Is Mission Wealth the right fit for my financial needs?
- What should I consider when deciding whether to change financial advisors?
- What type of advisor and expertise would best support my situation?
- Which financial priorities should I address first?
- How could a coordinated planning relationship simplify my financial life?

WHAT CLIENTS SAY ABOUT MISSION WEALTH

★★★★★

4 months ago

Every aspect of our relationship with Mission Wealth has been built with trust, respect, and professionalism. We deeply appreciate having such skilled people in our corner, helping us to navigate our financial future.

The testimonials included here are from current clients. Clients were not compensated and there are no material conflicts of interest. See our website for a representative list of all testimonials received.

Strategically Using Testimonials In Your Marketing

MISSION WEALTH®

WEBSITE: Mission Uses tags to dynamically align testimonials with the most relevant content and audiences

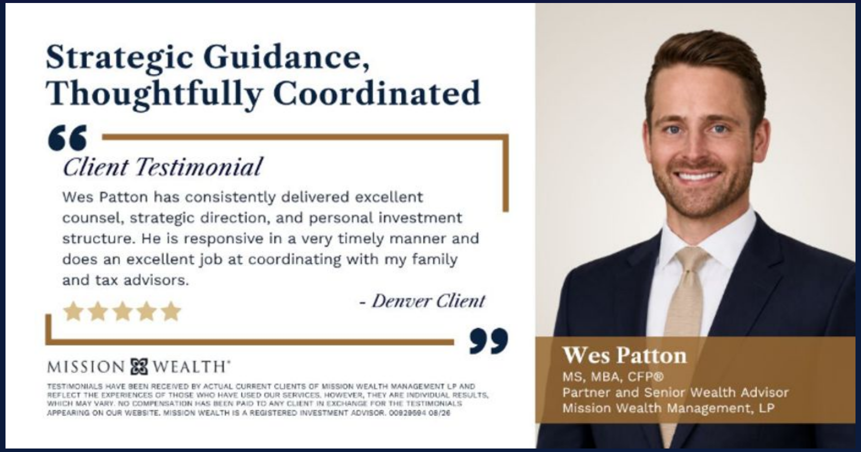
- **Homepage:** Our strongest firm-wide testimonials
- **Location pages:** Testimonials from clients associated with those locations
- **Service pages:** Testimonials describing experiences with specific services, including some longer client stories
- **Who We Serve / ICP pages:** Testimonials aligned with those target audiences
- **Advisor bio pages:** Testimonials from that advisor's own clients appear prominently
- **Leadership bio pages**: Testimonials and credibility markers support AEO/SEO as well as recruiting and M&A
- **Testimonials page:** A centralized experience where visitors can filter testimonials based on what matters most to them

WHAT MISSION WEALTH BUILT

Strategically Using Testimonials In Marketing

MISSION WEALTH®

SOCIAL MEDIA : Mission turns testimonials into branded social cards for Mission Wealth's LinkedIn and Facebook channels. The posts typically include the testimonial, information about the advisor, and a link to the advisor's bio page. Advisors can then reshare these posts on their own LinkedIn profiles or feature them. We also include the compliance case information within the creative.



Questions you've asked!

How do you leverage Google reviews if soliciting clients for them triggers the requirements in the SEC Marketing Rule for testimonials? There are no controls on Google's platform to add disclosures, monitor for content, or archive the reviews. And once we solicit them we become responsible for the compliance of the reviews.

Why are broker dealers so hesitant to allow this?

How do we overcome the fear of a bad reviews? what is the best way to handle getting a bad review?

I'd love to know how to best utilize ai to get our 248 5 star Google reviews working for us there as well. Reviews and testimonials are a big part of my marketing plan but definitely interested to learn more!!!

Interested in learning more about FMG Testimonials?

Scan to connect with our team and request a demo!

Or email marketing@fmgsuitecom!

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