

How Testimonials Turn Client Trust into AI Visibility & Growth

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Samantha Russell

Chief Evangelist, FMG



Susan Theder

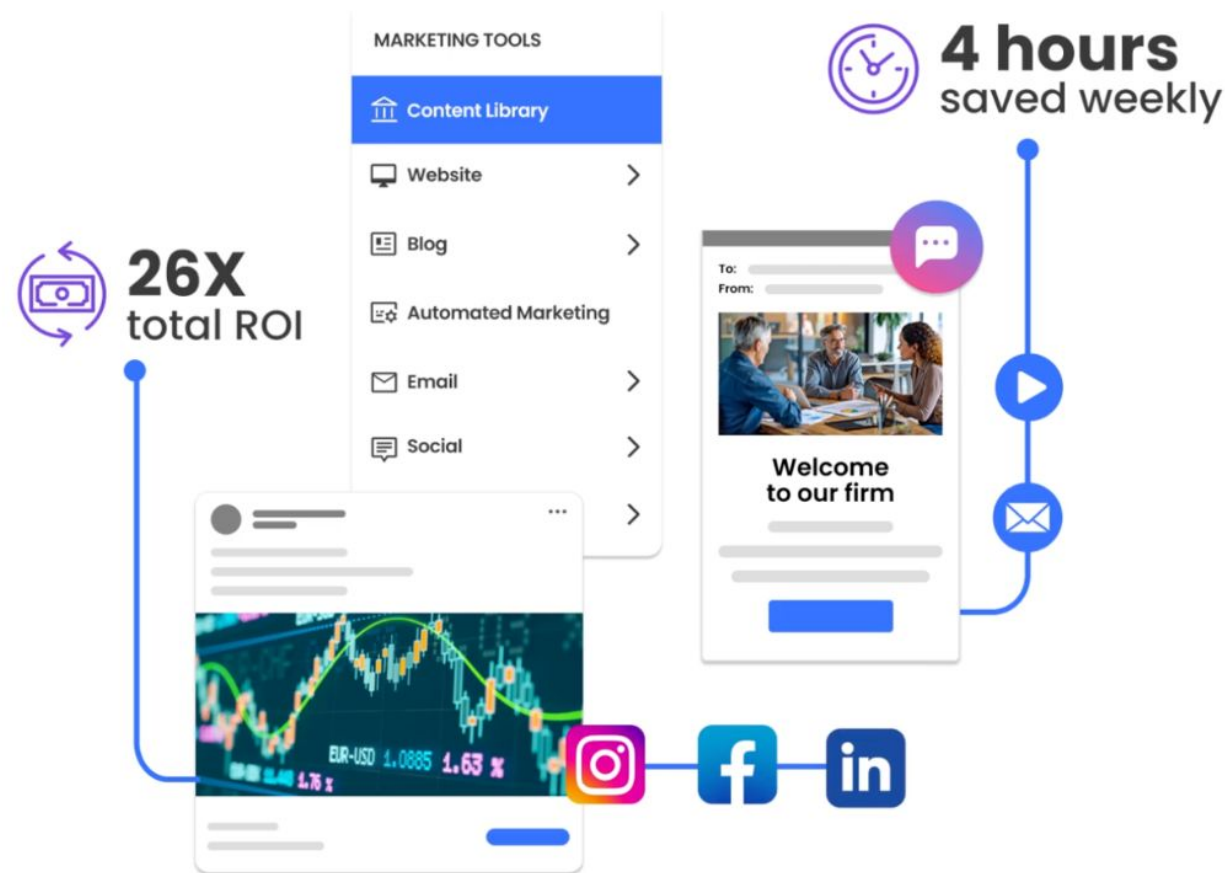
CMO & CXO



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

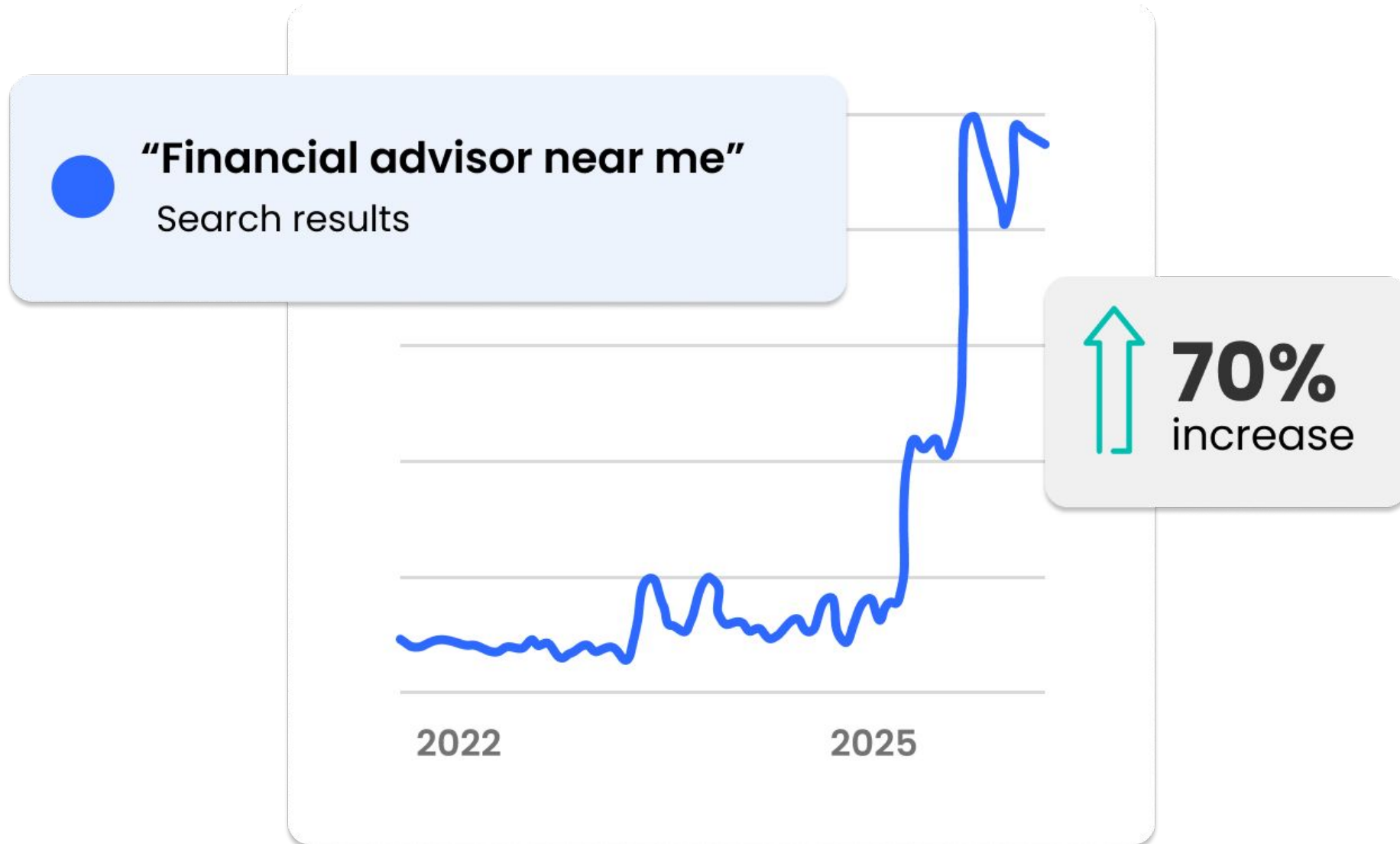
The presentation deck will be sent out along with the replay link.

3

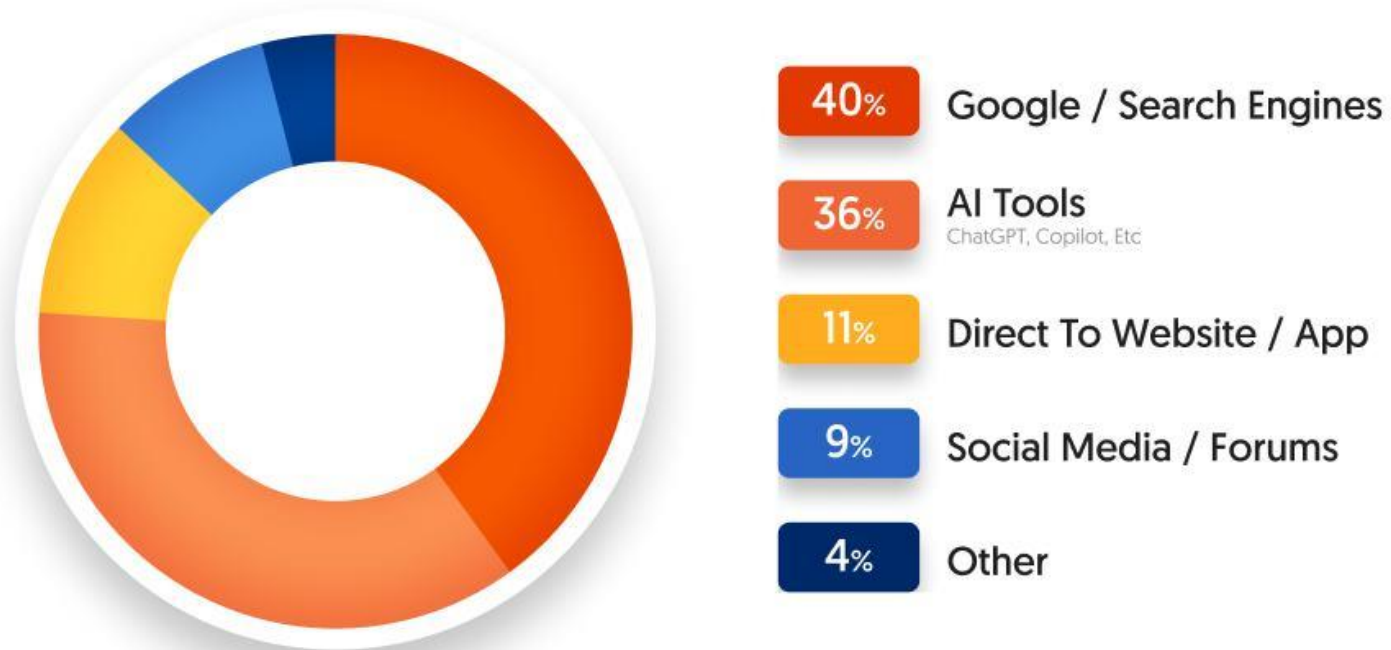
Plus a look at FMG Testimonials

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



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.

041102610A_K

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.

How does AI decide WHICH firm to recommend?



3 Main Pillars to Improve Your AEO Score

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.

Hear Directly From Our Ann Arbor, MI Clients

★★★★★

Tom K. | 03/20/2026

As for our advisor shinaola atora, he has been extremely client focused - relatable, attentive, responsive and an extremely active listener. If there is any area for improvement, I think the client portal could be more client useful. Currently, the portal seems more a placeholder for snapshot reports/scorecard. I wish it were more interactive. A tool for clients use on an ongoing basis, to analyze "what ifs"

★★★★★

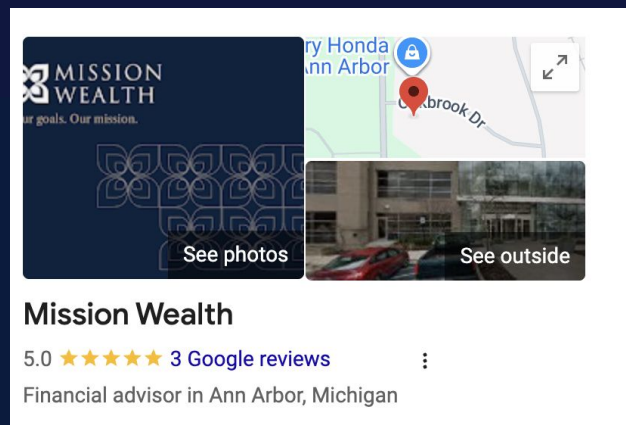
Janice R. | 03/04/2026

Shinaola and the team have been very thorough in answering our questions and have brought very good advice for improving our financials. Estate planning, social security, and taxes are some of the highlights.

2

Maximize impact

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

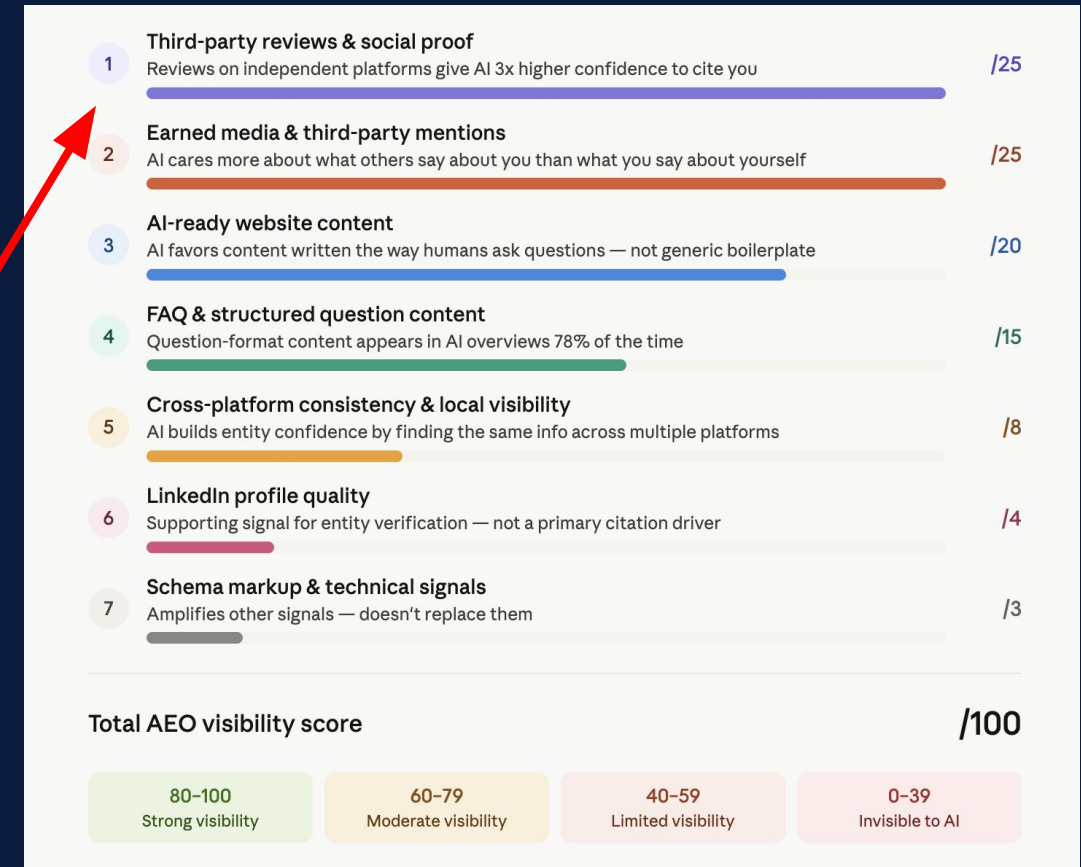


In 2021

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

The image shows a comparison of three sources of information, each in a white card with a colored header and a matching colored button at the bottom.

- What you say:** Header 'Your website' (grey circle). Content: 'We're trusted and client-first.' Below it, 'Every site says this.' and a red 'Unverified' button.
- What they say:** Header 'Client reviews' (green circle). Content: 'She talked me off a ledge in March 2020.' Below it, '87 reviews · 4.9★' and a green 'Verifiable' button.
- What AI repeats:** Header 'The AI answer' (blue circle). Content: 'Clients say she is communicative and always available.' Below it, 'Not your website copy.' and a green 'This gets cited' button.

At the bottom of the cards, a quote reads: *What others say about you now outranks anything you say about yourself.*

WHAT MISSION WEALTH BUILT

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**

The screenshot displays the FMG Testimonials interface. On the left is a dark sidebar menu with options: Campaigns, Testimonials, Google Reviews, Compliance Hub, Widgets, Sharing, Locations, Activity Log, Notifications, Integrations, Help Center, Team Settings, and a user profile for Samantha Russell. The main content area is titled 'New Testimonial Campaign' and includes a 'Back to Campaign Type Selection' link. It features three tabs: 'Form' (selected), 'Email Template', and 'Done'. Below the tabs is a 'Feedback Form' section with a 'Draft' status and the instruction 'Customize the feedback form'. The 'Form Styling' section includes fields for 'Company Logo*' (with 'Use Team Logo' and 'Use Team Icon' buttons), 'Company Name*' (filled with 'FMG Suite'), 'Description/Company Tagline' (filled with 'The All-in-One Digital Marketing & Compliant Texting Solu'), and 'Header Background Color*' (filled with '#2329c7'). A 'Header Font Color*' field is partially visible. To the right, a preview of the testimonial form shows the FMG Suite logo, a star rating prompt ('We want to hear from you. Candid feedback helps us serve you better. Please rate your experience'), and a text input field ('Tell us about your experience').

FMG TESTIMONIAL WORKFLOW

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.



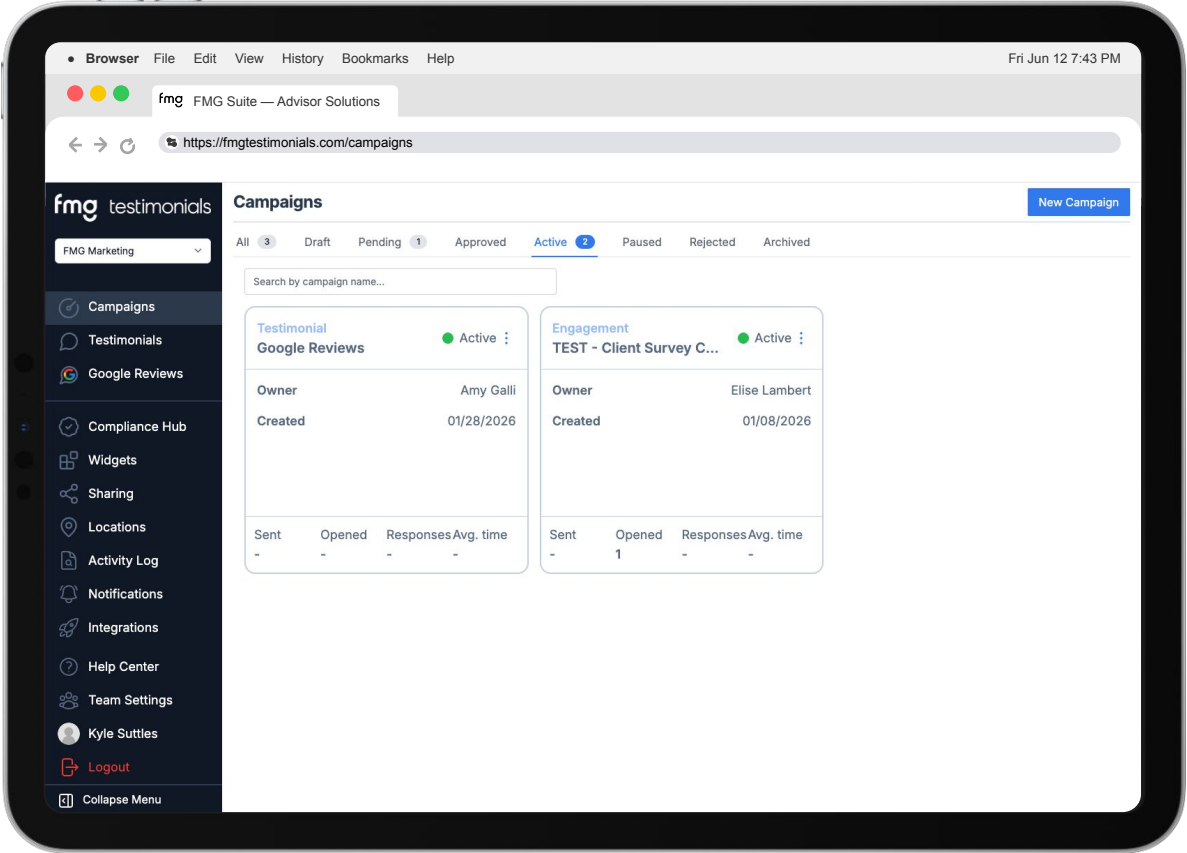
Review

Each submission routes to the home office queue.



Publish

Approved proof goes live on public website and advisor pages.



Automatically Update Websites



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.

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.



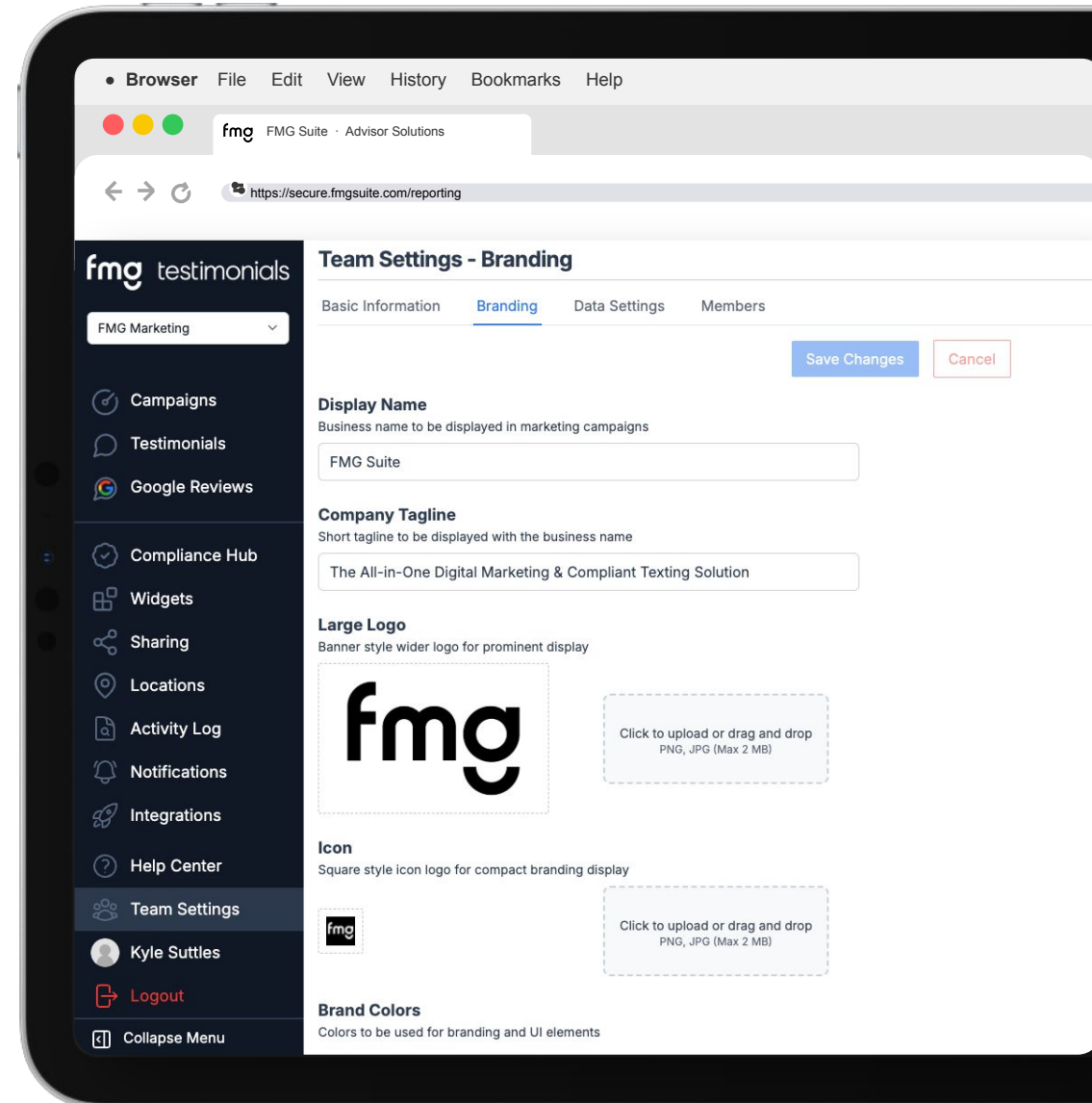
Data settings

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.



WHAT MISSION WEALTH BUILT

Example:

MISSION  WEALTH®

- 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.

WHAT MISSION WEALTH BUILT

MISSION WEALTH®

Kyle Buffo

CFP®

Client Development Advisor 

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 INTRODUCTION](#)

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.

WHAT MISSION WEALTH BUILT

Strategically Using Testimonials In Your Marketing



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



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.



Mission Wealth
 4,674 followers
 3d •

Trusted financial guidance means having a strategic partner who understands your goals and works collaboratively across every aspect of your financial life.

“Wes Patton has consistently delivered excellent counsel, strategic direction, and personal investment structure. He is responsive in a very timely manner and does an excellent job at coordinating with my family and tax advisors.”

Partner and Senior Wealth Advisor [Wes Patton MBA, CFP®, MS](#), provides personalized guidance and thoughtful coordination with families and other professional advisors, helping clients navigate complex financial decisions with greater clarity and confidence.

Looking for personalized wealth management and comprehensive financial planning? Connect with Mission Wealth to learn how our advisors can help you build a strategy around your unique goals: <https://lnkd.in/gFJdyA9u>

#MissionWealth #ClientTestimonial #WealthManagement #FinancialPlanning
#DenverFinancialAdvisor #InvestmentManagement

Strategic Guidance, Thoughtfully Coordinated

“
Client Testimonial
 Wes Patton has consistently delivered excellent counsel, strategic direction, and personal investment structure. He is responsive in a very timely manner and does an excellent job at coordinating with my family and tax advisors.
 ★★★★★ - Denver Client
 ”

MISSION  WEALTH™

TESTIMONIALS HAVE BEEN RECEIVED BY ACTUAL CURRENT CLIENTS OF MISSION WEALTH MANAGEMENT LP AND REFLECT THE EXPERIENCES OF THOSE WHO HAVE USED OUR SERVICES. HOWEVER, THEY ARE INDIVIDUAL RESULTS, WHICH MAY VARY. NO COMPENSATION HAS BEEN PAID TO ANY CLIENT IN EXCHANGE FOR THE TESTIMONIALS APPEARING ON OUR WEBSITE. MISSION WEALTH IS A REGISTERED INVESTMENT ADVISOR. 0022664 08/20



Wes Patton
 MS, MBA, CFP®
 Partner and Senior Wealth Advisor
 Mission Wealth Management, LP

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.

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

Why are broker dealers so hesitant to allow this?

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@fmgsuite.com!

fmg