



Testimonial **iQ**

LIVE DISCUSSION:

How to Show Up When Prospects Search for You

Your Client Testimonial Guide



Andrew Johnson
Co-Founder and CEO
of Testimonial IQ



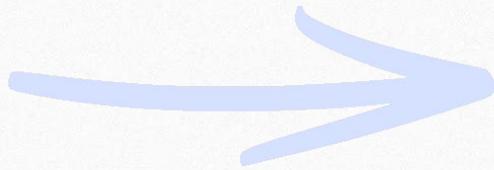
Susan Theder
CMO & CXO at FMG



Samantha Russell
Chief Evangelist at FMG

Free Giveaway:

Client Testimonial Guide



fmg

Build a **Compliant
Testimonial System**
That **Grows Your
Practice**

For Financial Advisors

Have You Gotten A Lead From ChatGPT, CoPilot or another AI Tool ?



Ryan Kus · 1st 17h ...

President | Financial Planner | Podcaster...

Yes. We had our first lead from Chat GPT. Yesterday prospect contacted us and he found us on Chat. Fun stuff!

Like · 1 | Reply



Cathy Curtis, CFP® · 1st 17h ...

Empowering High Net Worth Single Women to...

a great prospect, now client found me using ChatGpt!

Like · 2 | Reply · 3 replies



Matt Hylland · 1st 1w ...

Flat-Fee, Fee-Only, Fiduciary Financial Advisor | Financial Plann...

Just had our first as well! Not sure how/why we are included, but won't complain I guess. We have a few YouTube videos and blog posts that get OK traffic on the topic. But was a surprise for sure



Chelsea Ransom-Cooper, CFP® · 1st 2w ...

Leading the Next Generation of Diverse Financial Planner...

Yes! This happened to us and they shared the prompt!



Jane Mepham, CFP® · 1st (edited) 16h ...

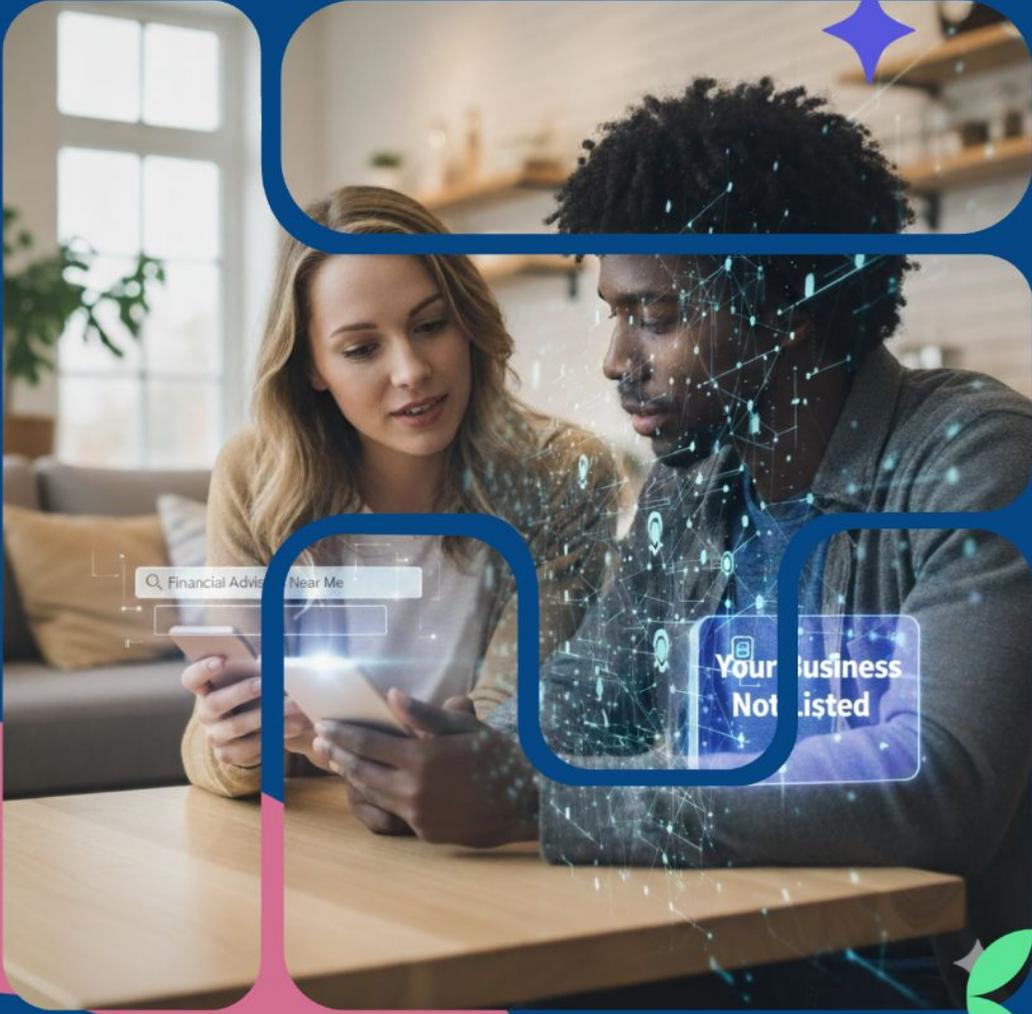
I help Foreign-Born Individuals (Immigrants) and Foreign Natio...

Since April 4- two ChatGPT, One Gemini AI and One Perplexity. One ChatGPT prospect has become a client.

Like · 6 | Reply · 4 replies

Visibility Crisis

The Biggest
Business Threat
No One is Talking
About



What Search Results Used to Look Like...



Google search results for "best financial advisor pittsburgh pa".

SmartAsset
https://smartasset.com › ... › Pennsylvania
Top 10 Financial Advisors in Pittsburgh, PA
Aug 11, 2025 — Looking for a financial advisor in Pittsburgh? We round up the top firms in the city, along with their fees, services, investment strategies ...

Carson Wealth
https://www.carsonwealth.com › locations › pittsburgh-...
Pittsburgh, PA | Financial Advisors
The financial advisors at Carson Wealth provide wealth management, financial planning and retirement planning services to Pittsburgh, Pennsylvania.

US News Money
https://money.usnews.com › ... › Advisors › Pennsylvania
Find a financial advisor near Pittsburgh, Pennsylvania
The US News Financial Advisor Finder can help you narrow down the best financial advisors in the Pittsburgh, Pennsylvania area.

Wright Associates | Pittsburgh
https://www.kswrightassociates.com
Wright Associates | Pittsburgh: Fiduciary Financial Advisor
We provide financial planning and investment management services in Pennsylvania & surrounding states helping you to make informed investment decisions.

Fort Pitt Capital
https://www.fortpittcapital.com › locations › individuals
Financial Advisors in Pittsburgh, PA
At Fort Pitt Capital Group, we specialize in financial planning, wealth management and investment analysis services for any individual or business owner. Fill ...

How They Look Today...



best financial advisor pittsburgh PA



Businesses

Carson Wealth

4.9 ★★★★★ (90) · Financial planner

15+ years in business · 1 Bigelow Sq 20th floor

Open · Closes 5 PM · (412) 904-2017

"... than 15 years, Neal McGrath has been our trusted **financial advisor**."



Website



Directions

Equilibrium Wealth Advisors

5.0 ★★★★★ (85) · Financial advisor

381 Mansfield Ave Suite 200A

Open · Closes 6 PM · (412) 991-1385

"This is the premier **financial planning** group in Pgh."



Website



Directions

North River Wealth Advisors

5.0 ★★★★★ (36) · Financial planner

3+ years in business · 5800 Corporate Dr Suite 300

Open · Closes 5 PM · (412) 783-1781

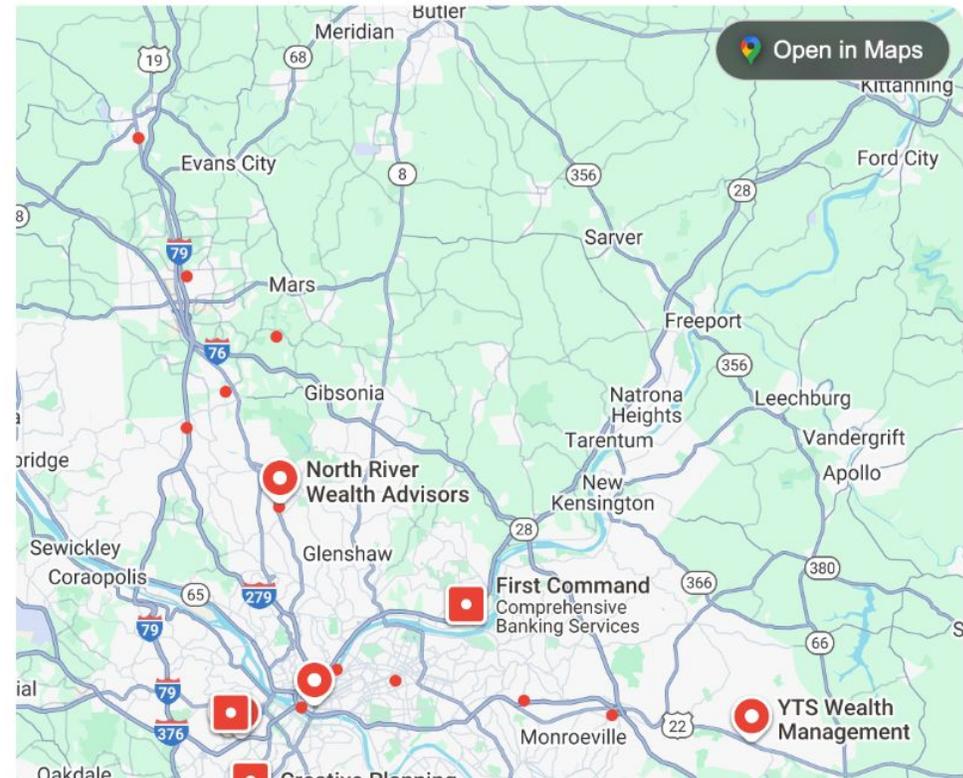
"... recommend North River to anyone looking for a **financial advisor**."



Website



Directions



How They Look Today...

 ChatGPT ▾

who are are the best financial advisors in pittsburgh, pa

Pittsburgh, Pennsylvania, boasts a diverse array of financial advisory firms catering to various financial needs. Here are some notable financial advisors in the Pittsburgh area:

[Legend Financial Advisors, Inc.](#)

Pittsburgh, PA

Established in 1993, this firm offers comprehensive wealth management services, including financial planning, investment management, IRA rollovers, and 401(k) management. They focus on creating personalized financial plans based on clients' expenses and risk tolerance. EXPERTISE.COM

[JFS Wealth Advisors](#)

Pittsburgh, PA

Founded in 1986, JFS provides integrated investment strategies and financial solutions to individuals, businesses, and families. Their services encompass retirement planning, estate planning, and investment management. EXPERTISE.COM

[Fragasso Financial Advisors](#)

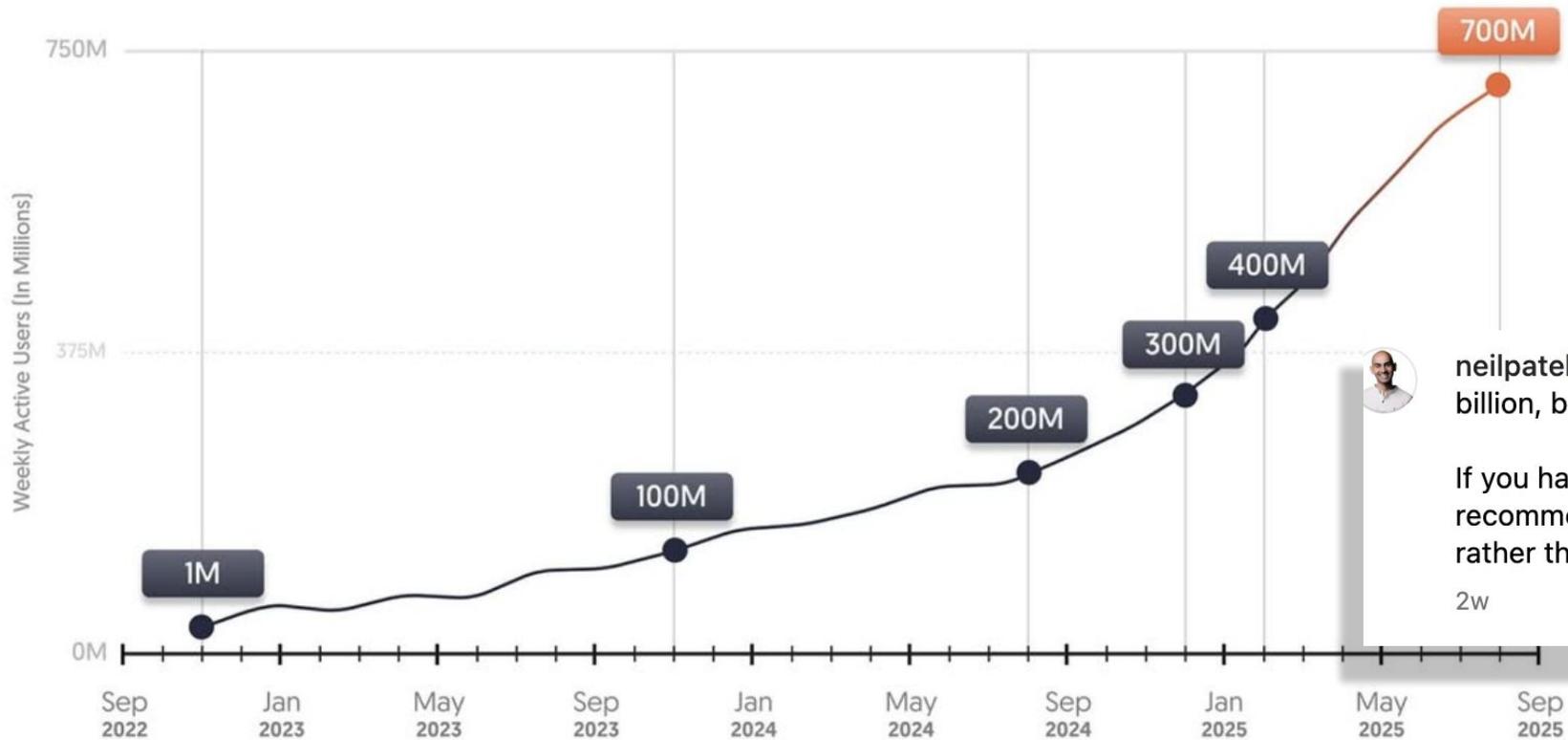
Pittsburgh, PA

Recognized by Forbes and Barron's, Fragasso offers a range of services, including income tax reduction strategies, life insurance, long-term ca  ost analysis, estate planning, and business

AI Search Is Predicted to Overtake Traditional Search By 2028

Traffic Share	2025	2026	2027	2028	2029
Traditional Organic Search	97%	83%	52%	25%	13%
LLMs	4%	17%	48%	75%	87%

ChatGPT Weekly Active User Count: 100M Milestones



neilpatel ChatGPT may already be popular and worth \$300 billion, but its adoption is growing at a faster pace.

If you haven't started optimizing your business so it gets recommended by ChatGPT, you should probably do so sooner rather than later.

2w

WHAT TO DO NEXT:

ChatGPT is one of the fastest-growing search engines. You shouldn't wait to optimize for it.



Why Is AI Search Growing So Fast?

Because we no longer want links. **We want answers**





Pt. 1: Get Reviews

Social Proof + Sentiment Signaling

AI models are trained to rely on social credibility heavily, and want to reflect broad consensus from actual humans

This makes reviews incredibly important to have if you want to show up in AI search

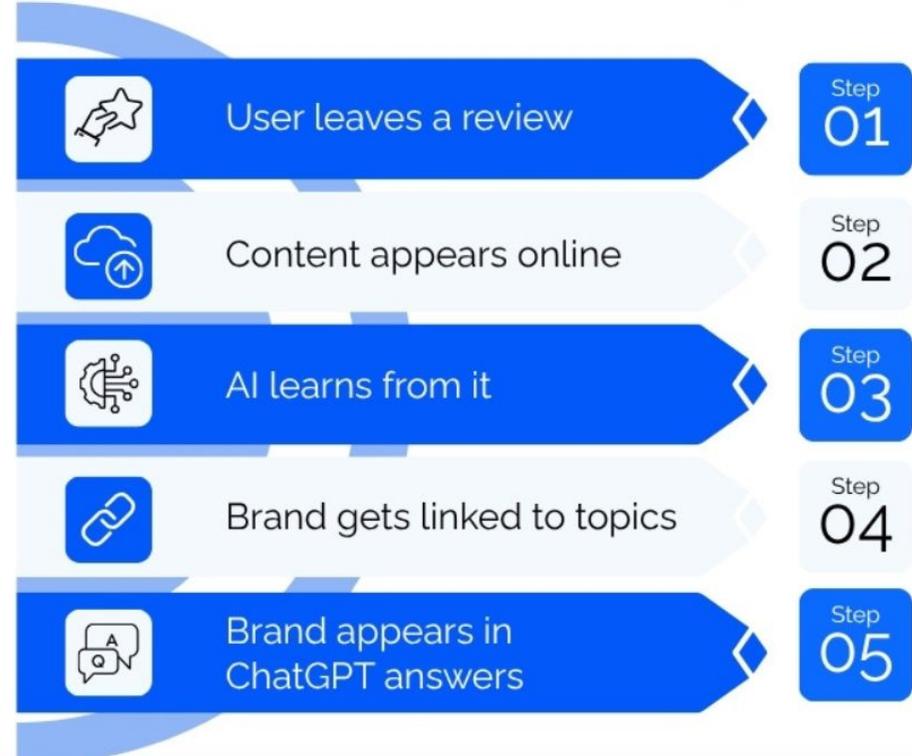
Why AI Tools Lean on Reviews:

Reviews are a “trust” signal. REAL people have used this business.

The language clients use in the review gets “tied” to your brand

The more you are mentioned along with certain keywords, the more you will be “known” to AI for those words

How Reviews Boost ChatGPT Visibility



HOW we search on LLMs is also massively different



☰ ChatGPT 5 ▾



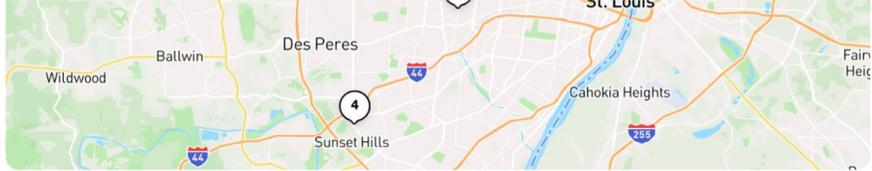
My husband and I are in our late 40s and own a successful business in St. Louis. We are looking for a financial advisor who can help us with tax planning, legal questions, and investments, as well as making better long term financial decisions that impact both us personally as well as the business. We also need to think about estate planning and setting things up for our three children. Can you recommend some financial advisors we should talk to?

WHO gets recommended varies GREATLY by LLM

Chat GPT Results



ChatGPT 5 ▾



- 

Correct Capital Wealth Management
Open now until 5:00 PM · 5.0 (1 reviews)
Independent fiduciary advisors who offer tax planning, business-owner financial planning, retirement and investment strategies.

Directions Website Call
- 

Toberman Becker Wealth
Open now until 5:00 PM · 5.0 (18 reviews)
Fee-only advisors with background in personal and corporate finance—tailored to business owners.

Directions Website Call
- 

Thornton Financial LLC
Open now until 5:00 PM · 4.9 (41 reviews)
Fee-only CFP® and Enrolled Agent specializing in tax & wealth planning for individuals and small businesses.

Directions Website Call
- 

Stonebridge Financial Group
Open now · 5.0 (10 reviews)
Wealth management, retirement income planning, estate planning for individuals and small business owners.

Directions Website Call ↓

Google's AI results →

Only ONE was the same as ChatGPT



my husband and I are in our late 40s and own a successful business in St. Louis. We are loo

Fee-only fiduciary firms

Moneta Group [🔗](#)

- **Specialization:** As a large, local, employee-owned Registered Investment Advisor (RIA), Moneta offers a wide range of services for high-net-worth individuals and families.
- **Key features:** They operate on a fee-only basis, meaning their compensation comes directly from clients, which avoids potential conflicts of interest from commissions.
- **Team approach:** Moneta is organized into client service teams, so you would have a dedicated group working on your account, which can be beneficial for coordinating complex business and personal finances. [🔗](#)

Toberman Becker Wealth [🔗](#)

- **Specialization:** This firm focuses on providing concierge-level service to business owners and families.
- **Key features:** They are a fee-only, fiduciary firm with partners who grew up in the St. Louis area. They can assist with investment management, tax planning, estate planning, and business succession.
- **Certifications:** The firm is led by dual-certified CFA/CFP professionals, indicating expertise in both investment analysis and comprehensive financial planning. [🔗](#)

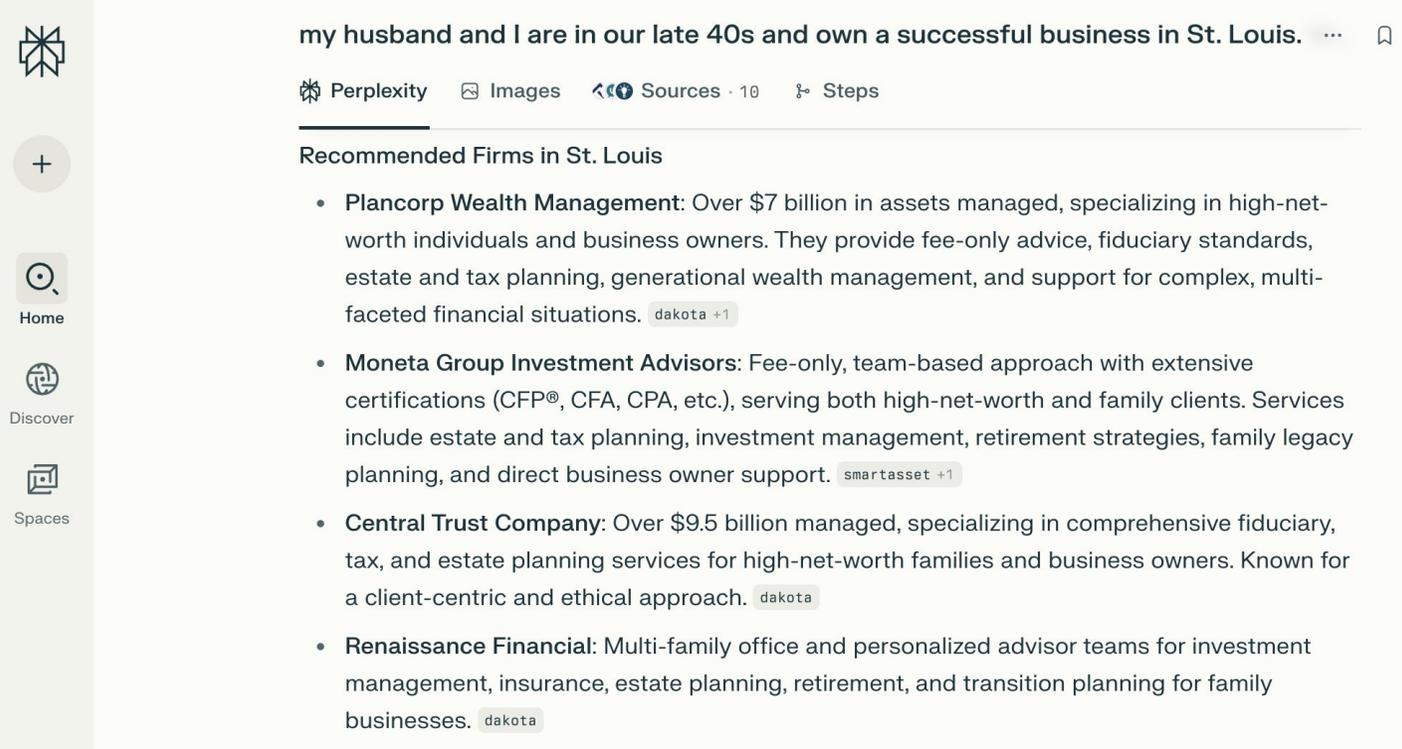
Moment Private Wealth

- **Specialization:** With a strong focus on high-growth entrepreneurs, this RIA is experienced in handling complex financial situations.
- **Key features:** Client reviews praise their genuine commitment to supporting personal and business goals, as well as their expertise in complex planning,

Perplexity Results →

Only ONE was the same as Google AI

And ZERO the same as ChatGPT



The screenshot shows a search interface with a sidebar on the left containing icons for Home, Discover, and Spaces. The main content area displays a search result for the query "my husband and I are in our late 40s and own a successful business in St. Louis." The results include a list of recommended firms in St. Louis:

- Plancorp Wealth Management:** Over \$7 billion in assets managed, specializing in high-net-worth individuals and business owners. They provide fee-only advice, fiduciary standards, estate and tax planning, generational wealth management, and support for complex, multi-faceted financial situations. dakota +1
- Moneta Group Investment Advisors:** Fee-only, team-based approach with extensive certifications (CFP®, CFA, CPA, etc.), serving both high-net-worth and family clients. Services include estate and tax planning, investment management, retirement strategies, family legacy planning, and direct business owner support. smartasset +1
- Central Trust Company:** Over \$9.5 billion managed, specializing in comprehensive fiduciary, tax, and estate planning services for high-net-worth families and business owners. Known for a client-centric and ethical approach. dakota
- Renaissance Financial:** Multi-family office and personalized advisor teams for investment management, insurance, estate planning, retirement, and transition planning for family businesses. dakota

But even more interesting...

Is **LLM reasoning** behind who they chose...

thanks. can you share how you decided to show the first 4 results?

1. Comprehensive Services Matching Your Needs

You emphasized wanting **tax planning, legal coordination, investments, estate planning, and both business and personal guidance.**

- These four firms clearly advertise a **breadth of services** (not just investments).
- For example, Thornton Financial highlights tax specialization, while Stonebridge emphasizes estate planning.

2. Strong Local Presence in St. Louis

Each of the four is **headquartered locally**, with dedicated offices in St. Louis or Clayton. This makes them well-suited for both in-person consultations and navigating **Missouri-specific estate/tax laws.**

1 Thing ALL platforms had in common...

Every advisor Recommended ALL Had Reviews or Testimonials



thanks. can you share how you decided to show the first 4 results?

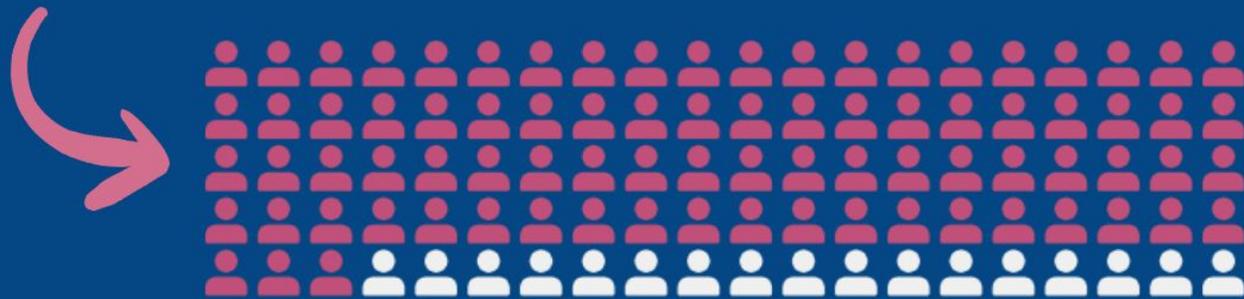
3. Fee-Only or Fiduciary Approach

- You mentioned wanting advice that integrates both personal and business finances.
- Fee-only fiduciary advisors are typically better for complex planning, as they avoid commission-driven conflicts.
- Correct Capital, Toberman Becker, and Thornton are explicitly **fee-only fiduciary firms**, which is a strong marker of client-first advice.

4. Reputation and Client Reviews

- All four maintain **excellent reputations online**, consistently rated **4.9–5.0 stars** across multiple reviews.
- That suggested reliability and strong client satisfaction.
- Since you're making a long-term decision, I prioritized advisors with strong trust signals.

✦
But what's interesting is this: After being referred to a financial advisor, 83% want to read online reviews...



... Yet only 9.3%
of advisors
publish reviews
online.



**Want AI & Google To
Recommend Your
Business?**



**Start Collecting
Reviews & Testimonials**

fmg



 Poll

What's the **number 1 thing holding you back** from collecting reviews and/or testimonials?

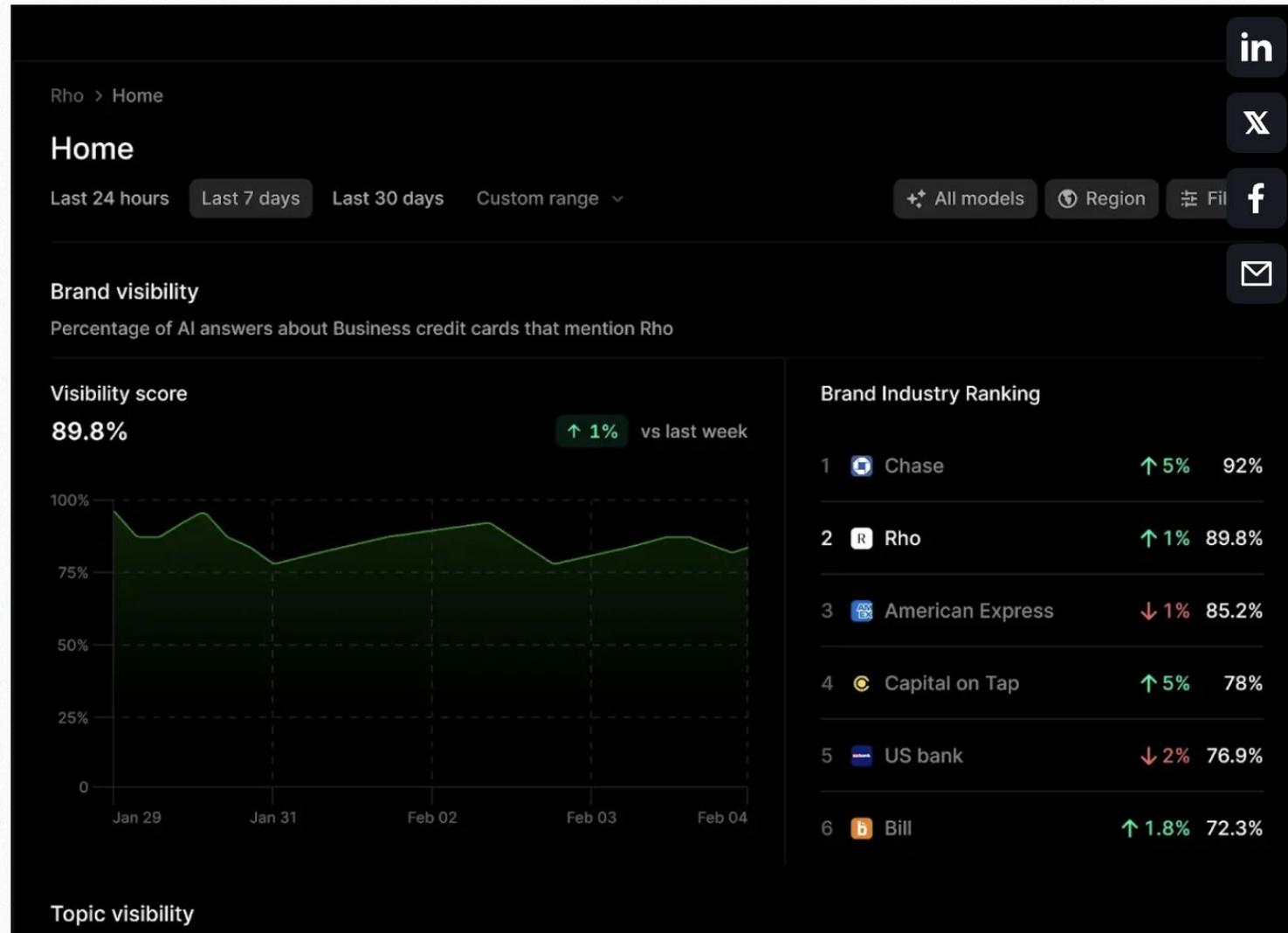
fmg



Are you Invisible to AI? Track Your AI Visibility

Tools To Try:

- Profound
- Peec AI
- Otterly
- SEM Rush





Pt. 2: Stay Compliant

Know The Rules

Why Did The SEC Change the rules?

What is the Difference Between A Testimonial & An Endorsement?

How Do You Ask Compliantly?



Testimonial

any statement by a current client:

- (i) About the client or investor's experience with the investment adviser or its supervised persons;
- (ii) That directly or indirectly solicits any current or prospective client or investor to be a client of, or an investor in a private fund advised by, the investment adviser; or
- (iii) That refers any current or prospective client or investor to be a client of, or an investor in a private fund advised by, the investment adviser.

Advertisement

(1) Any direct or indirect communication an investment adviser makes to more than one person...that offers the investment adviser's investment advisory services...; [or]

(2) Any endorsement or testimonial for which an investment adviser provides compensation, directly or indirectly...

Endorsement

any statement by a person other than a current client that:

- (i) indicates approval, support, or recommendation of the investment adviser or its supervised persons or describes that person's experience with the investment adviser...
- (ii) directly or indirectly solicits any current or prospective client or investor to be a client of, or an investor in a private fund advised by, the investment adviser; or
- (iii) refers any current or prospective client of, or an investor in a private fund advised by, the investment adviser.



Collecting & Displaying

Testimonials →

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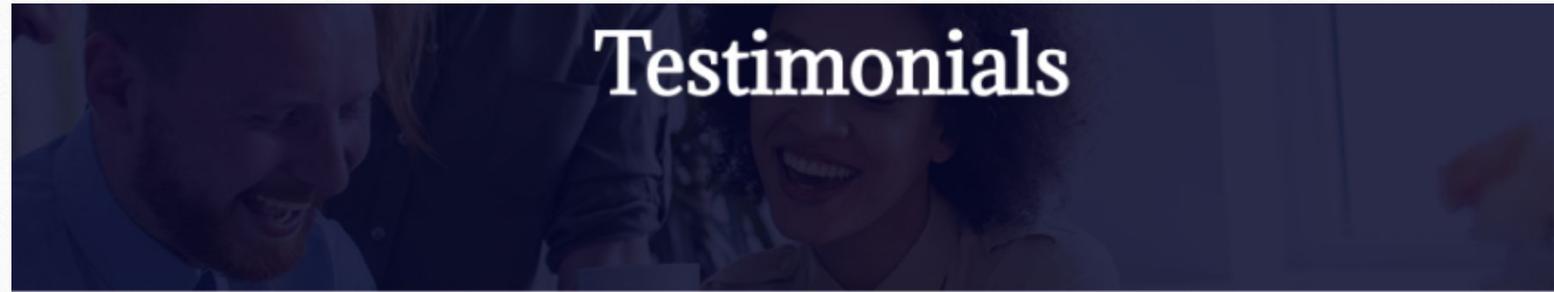
Do:

- Ensure everyone has an equal opportunity to share feedback
- Use a consistent and unbiased approach
- Ensure client has provided permission to share their testimonial
- Maintain a record of the process

Don't:

- Ask only your favorite clients
- Tell your clients what to write or encourage only positive responses
- Engage in any form of review-gating
- Offer or imply compensation*

How Should You Display Testimonials?



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.

★★★★★ 30 days ago What an amazing firm	★★★★★ 1 month ago Amazing team!	★★★★★ 1 month ago this is a wonderful firm	★★★★★ 2 months ago Amazing team! For everything from retirement to saving for a home, they have us covered.
★★★★★ 2 months ago Amazing team! truly wonderful advisors and I can't recommend them enough.	★★★★★ 3 months ago I have been working with Treetop for over 10 years now. I mean it when I say Blaire is more than just an advisor - she is a friend I trust with some of the biggest decisions our family has made.	★★★★★ 3 months ago Amazing firm! Can't say enough about Blaire. I actually just wrapped up a review meeting. They are always so prepared and know how to make complex scenarios easy to understand. I really feel like I am in great hands with this team.	★★★★★ 3 months ago What a breath of fresh air it has been working with Treetop! Great communication. Detailed financial plans. Wonderful people all around.
★★★★★ 3 months ago Wonderful firm. Wonderful people. Tremendous expertise in wealth management.	★★★★★ 3 months ago I receive frequent updates and they respond quickly when I have questions. I would absolutely recommend Treetop to anyone looking for a financial advisor.	★★★★★ 3 months ago Very detail-oriented! I feel like Treetop knows my portfolio better than I do. It gives me a great deal of confidence in the advice they provide.	★★★★★ 3 months ago Amazing team and wonderful office staff! Feels like an extension of our family!
★★★★★ 3 months ago Blair really took the time to get to know our family when building a plan. Nothing like the cookie-cutter approach			★★★★★ 2 months ago

Compliance Considerations

When Displaying Testimonials



CLEAR & PROMINENT

- Are they a current client?
- Were they compensated?
- Are there any material conflicts of interest?
- Terms of any compensation
 - Description of material
 - Conflicts of interest

Compliance Considerations

Have A Process.
Write It Down.
Prove You Followed It.



Email Option B:

Subject: Quick favor

Hi {{FirstName}},

*Would you mind taking a minute to share your **experience with our firm?***

You'll also be given an option to share your feedback publicly on Google. If you are comfortable partner with our team.

Email Option A:

Subject: We'd love to hear your feedback!

Hi {{FirstName}},

We take our fiduciary obligation seriously, and part of that means gathering real, unbiased feedback from our clients. We want to know what we are doing well and where we have room for improvement.]

*We'd greatly appreciate it if you could take 2-3 minutes of your time to share your feedback in this short **survey.***

*Sincerely,
<advisor name>
<company name>*



Google Reviews & Compliance Considerations ...→

fmg



Google Reviews:

Testimonials & Advertisements

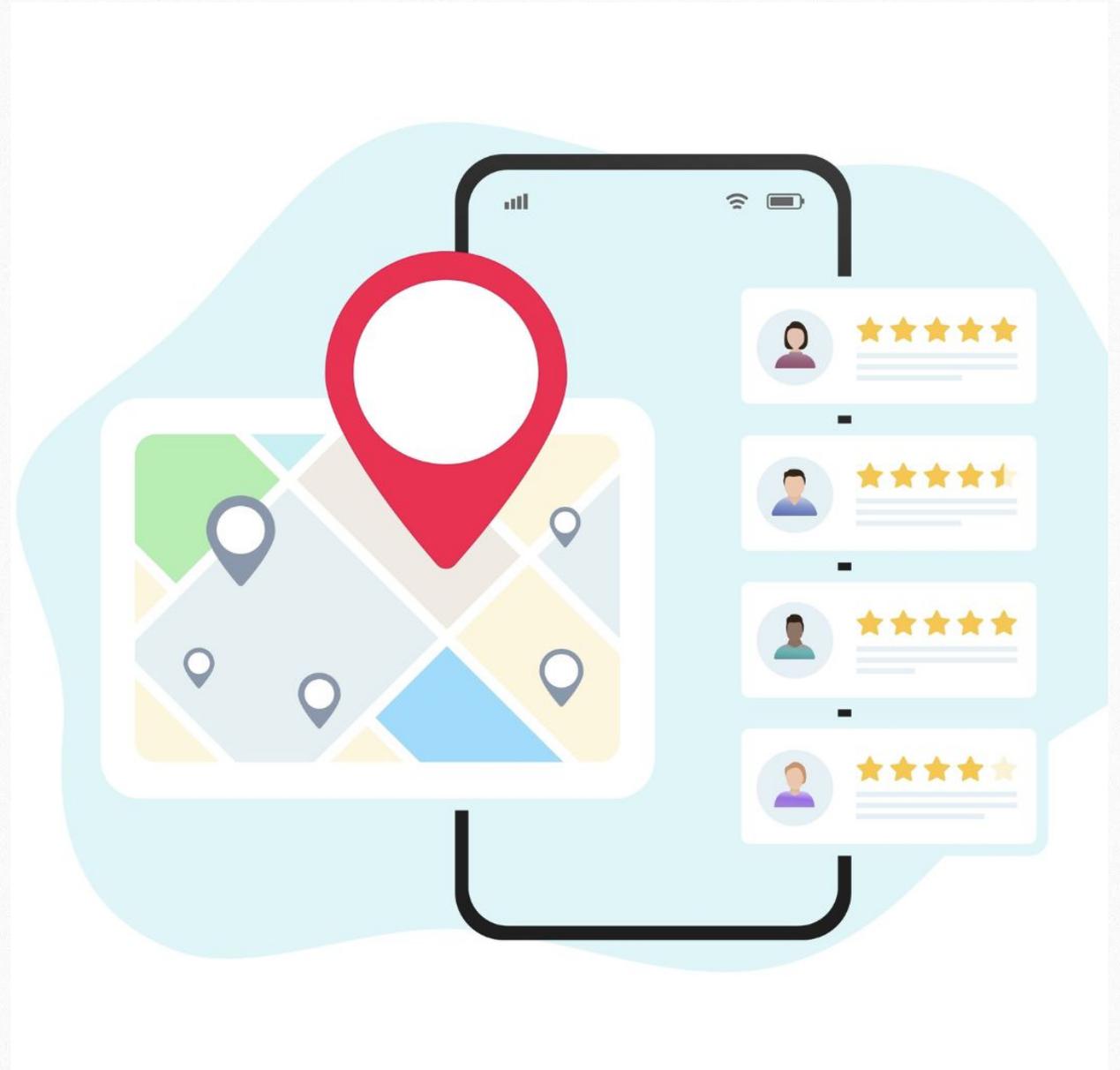
→Cautions around overlap

Entanglement & Adoption

→Don't turn your GBP into an advertisement

Google TOS

→ Be careful when repurposing Google Reviews



Entanglement Examples:

- Writing the review for your client
- Review-gating
- Asking clients to write certain things
- Only asking your favorite clients

Compliance-Friendly Language to Request Reviews

When asking clients for reviews, use neutral language that encourages honest feedback:

✓ Good examples

- “We’d appreciate your honest feedback about your experience working with us.”
- “Your review helps other families make informed decisions about financial planning.”
- “We welcome all feedback – positive or constructive – to help us serve clients better.”

✗ Avoid

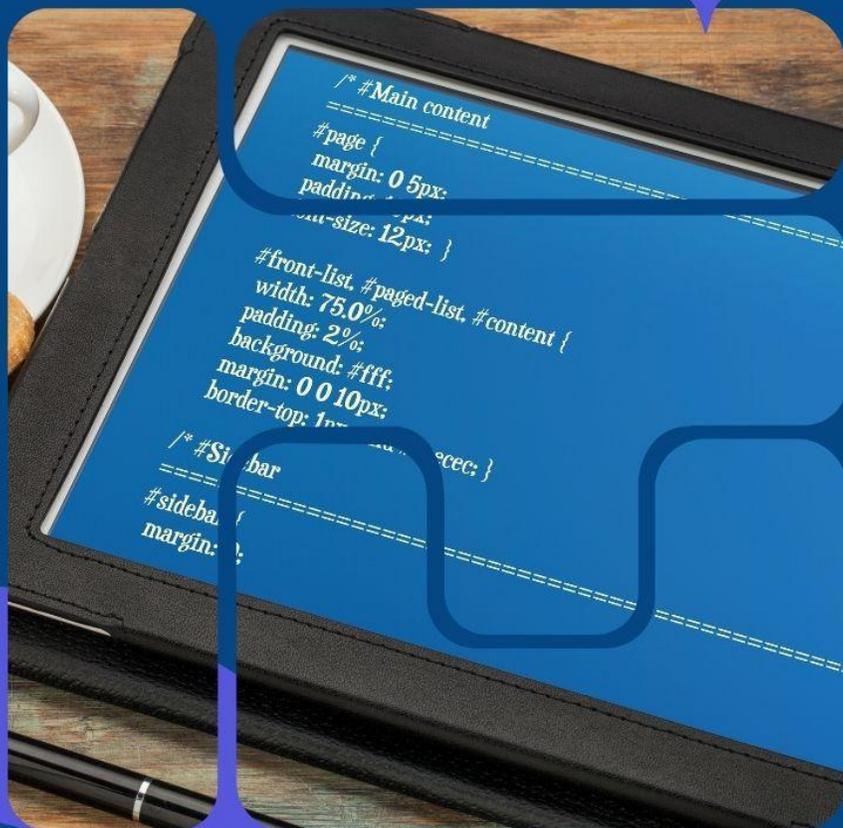
- “If you’ve had a great experience, please leave us a 5-star review!”
- “We’d love a positive testimonial if you’re happy with our service.”
- Any language that suggests you only want favorable reviews

Adoption Examples:

- Showing off your Google rating on your website
- Placing a Google Reviews widget on your website
- Telling your prospects to go check out your amazing Google Reviews

See what our clients are saying and read all of our reviews! ★★★★★

[READ OUR REVIEWS](#)



Pt. 3: Format Content For AI Discoverability

Schema Markup, FAQs, Q&As

Tools like ChatGPT show preference to advisors who provide financial content in a specific format.

This includes answering questions, posing questions, and some back-end coding that tells ChatGPT “this is an answer to feature”.

Key AEO Strategies

1. Format in a Question- Answer style
2. Target question-based queries (e.g., 'People Also Ask')
3. Include FAQ page(s) on your website
4. Optimize for featured snippets (bulleted lists, short answers)
5. Write in a conversational style for AI search tools
6. Place short, clear answers at the top of content
7. Importance of Local Listings & Claiming/Optimizing Google My Business

Format Content for AI - How FMG Helps

NEW FMG FEATURE:
FAQ Pages & Schema Markup



fmg

888.888.8888 | info@fmg.com | Login

fmg | Sections & Templates | Hub Pages | Forms | Tools | Resource Center | Schedule a Consultation

Frequently Asked Questions

Financial Planning Basics

What's the difference between a Roth IRA and a traditional IRA?

A traditional IRA allows for tax-deductible contributions (subject to income limits), with withdrawals taxed as ordinary income in retirement. A Roth IRA uses after-tax contributions with tax-free withdrawals in retirement. The choice between them often depends on your current tax situation, expected future tax rates, and retirement timeline.

How much should I save for retirement?

While individual situations vary, many financial professionals suggest saving 10-20% of gross income for retirement. However, this percentage may change based on factors like your age when you start saving, desired retirement lifestyle, and other sources of retirement income. We can help you determine a savings rate that aligns with your specific retirement goals.

What is an emergency fund and how much should I have?

An emergency fund is money set aside for unexpected expenses like job loss, medical bills, or major home repairs. Most financial professionals recommend saving 3-6 months of living expenses in a readily accessible account. The exact amount depends on your job stability, family situation, and personal risk tolerance.

This FAQ is for informational purposes only and should not be considered personalized financial advice. Please consult with a qualified financial advisor to discuss your specific situation.

Still have questions? Fill out our contact form below!

Have a Question?

Name

Email

Phone

Message

Contact
Office: 888.888.8888

Quick Links
Retirement

The content is developed from sources believed to be providing accurate information. The information in this material is not intended as tax or legal advice. Please consult legal or tax professionals for any questions. Information provided on this site is not intended to be used as a substitute for professional advice.

Keep the AI Recency Bias Mind: Publish & Update Often

SEO » Article

Researchers fooled AI models with fake dates to boost visibility

Published: October 9, 2025 at 1:20 pm | Read Time: 4 minutes

Add a fake 2025 date, increase your AI visibility. A new study shows ChatGPT and rivals reward recency over relevance.

✦ Focus On 3 Things:

- **Get Reviews** - The more REAL people are talking about you, the better. Publish those reviews on your website
- **Build Reputation** - publish different types of content, land on podcasts and other prominent sites, get quoted in the media, apply for industry awards
- **Format content for AI** - focus on longform content, Q&A and FAQ pages both onsite and offsite, schema markups, and add quick summaries to content

Want to learn more?

Book a 20-minute consult →

Questions? Marketing@fmgsuite.com

