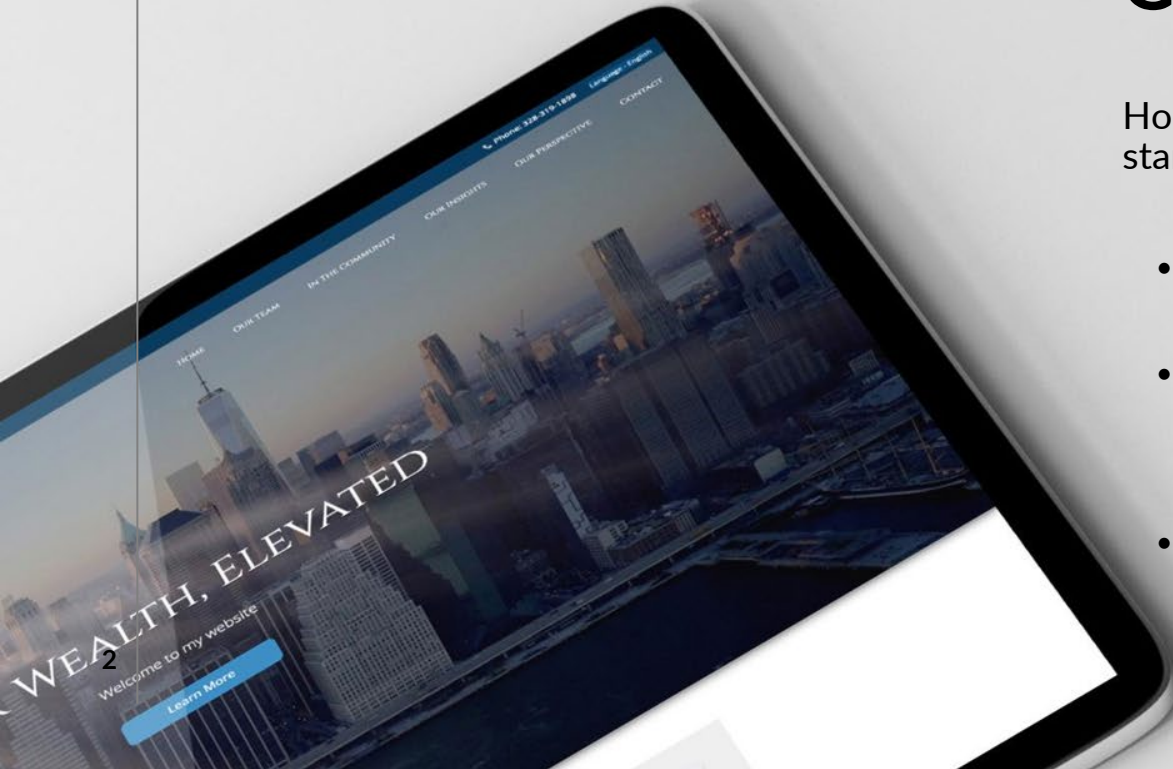




LIVE WEBINAR

How to create a financial advisor website that generates revenue & leads





Creating a Financial Advisor Website that Generates Leads

Housekeeping Notes before we get started...

- This webinar is being recorded.
- Throughout the presentation please do not hesitate to use the chat box for any questions.
- Suggestions on a future topic? Send an email with the subject line "Webinar Topic" to tim.merrill@veriday.com



Tim Merrill

@TimMerril

/in/TimMerrill1

tim.merrill@veriday.com

Past blogs and webinars:

<https://digitalagent.com/blog/>



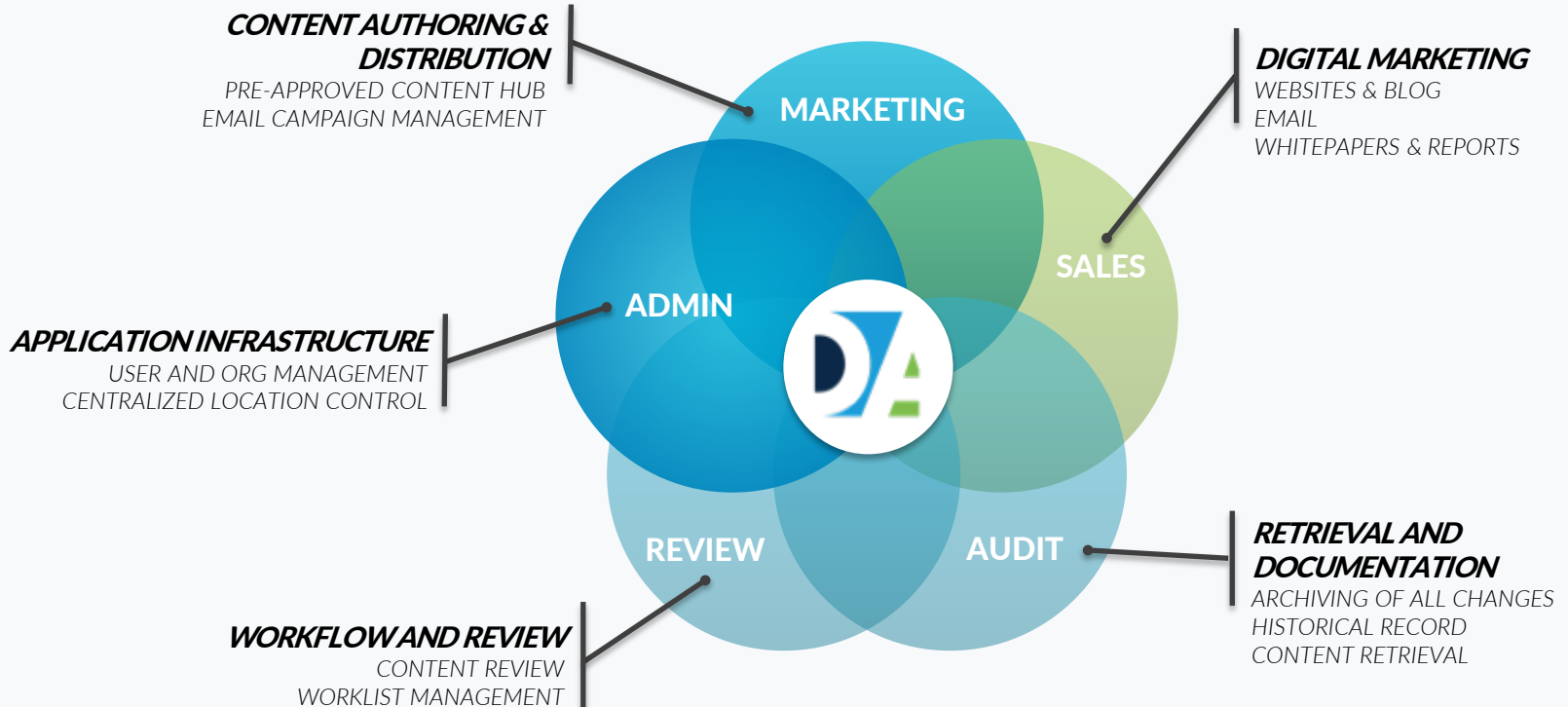
Digital Engagement with a Human Touch

Veriday transforms your digital engagement approach into an agile, strategic platform with greater reach, faster time to market and better results.

Our Digital Agent platform transforms digital engagement for a carrier's agents by developing customized, intuitive and user friendly experiences.

- **Privately Owned** **Founded 2003**
- **+100 Employees** **Offices in Toronto & NYC**

The Digital Agent Platform Overview



DIGITAL AGENT

A few of our Digital Agent clients

Ease of use, adoption, advisor support, lead generation, assets under management. Other marketing platforms make you choose. With Digital Agent, you can be the hero to any of your stakeholders. When organizations implement Digital Agent as their advisor marketing solution, they free their support teams to provide strategic guidance to their advisor network. Ultimately, unlocking their advisors to become expert marketers and grow their book of business.





Agenda

- What is an Online Presence?
- Nailing that First Impression.
- Content Marketing
- On Page vs. Off Page
- Converting Leads
- Q&A

What is an online presence?

An online presence is the **collective existence** online of a **company** or **individual**.

Yes, your website is one example...

VERIBANK

TAKE YOUR WEALTH TO NEW HEIGHTS

It also encompasses everything else that can be found upon conducting an online search of **YOU**





There are lots of things that could come **UP**

Even if you're not active online, you'll still find that you could pop up on some obscure listing like I did [here](#).

THE MUD RUN
Sunday, June 6th, 2010

5K SOLO FINISHERS

Place	Bib#	Runner	TIME	GENDER	AGE GROUP
1	673	Jimmy SEMES	24:52.7	1/38 M	1/23 M-Adult
2	726	Myles MCCUTCHEON	25:36.3	2/38 M	2/23 M-Adult
3	678	John RUTKOWSKI	27:33.4	3/38 M	1/8 M-Teen
4	764	Susan ANDERSON	27:35.0	1/150 F	1/93 F-Adult
5	770	Taquali DAHLIA	27:44.5	2/150 F	1/35 F-Teen
6	634	Ed MARACHLIAN	28:48.7	4/38 M	3/23 M-Adult
7	788	Thomas PORK	28:50.9	5/38 M	
8	762	Stacey BANGERTER	28:53.1	3/150 F	2/93 F-Adult
9	729	Nia BRANDT	29:00.2	4/150 F	3/93 F-Adult
10	975	Kurtis STRIKWERDA	29:18.5	6/38 M	4/23 M-Adult
11	654	Harper STONE	29:19.6	7/38 M	1/1 M-Kids
12	179	Susan STONE	29:28.9	5/150 F	4/93 F-Adult
13	637	Elizabeth RUTKOWSKI	29:58.2	6/150 F	2/35 F-Teen
14	659	Hilary ANDERSON	30:01.5	7/150 F	3/35 F-Teen
15	611	Andrew SCOTT	30:12.5	8/38 M	2/8 M-Teen
16	714	Mary QIU	30:23.1	8/150 F	4/35 F-Teen
17	672	Jessie LINTON	30:44.7	9/150 F	1/13 F-Kids
18	718	Meghan GRONDIN	30:57.6	10/150 F	5/93 F-Adult
19	647	Georgia STONE	31:50.7	11/150 F	2/13 F-Kids
20	180	Sydney POPESCU	31:52.4	12/150 F	5/35 F-Teen
21	660	Holly MUIRHEAD	31:56.4	13/150 F	6/35 F-Teen
22	751	Sabrina RASMUSSEN	33:19.9	14/150 F	6/93 F-Adult
23	697	Laura ROBINSON	33:21.1	15/150 F	7/93 F-Adult
24	696	Kreutzner CHRIS	33:24.2	9/38 M	5/23 M-Adult
25	600	Aaron LAMPE	33:31.5	10/38 M	6/23 M-Adult
26	715	Mathew HAMILTON	33:31.7	11/38 M	7/23 M-Adult
27	775	Tricia WIERSTRA	33:33.4	16/150 F	8/93 F-Adult

Dispelling the myths of an online presence

My Clients Are NOT Online



Numerous studies say otherwise..



Nearly two in three of mass affluent consumers take action after using social media to discover and consider financial products and services

(The DigitalFA, 2014)



About 90% of mass affluent consumers use social media.

87% of consumers research a product or service online before contacting a business.

**It
takes
too
much
time**



Building your online presence will not require drastic changes to your business.

A digital marketing plan with small amounts of time devoted each week is all you need



Your Best Marathon Plan

An intermediate plan, developed by coach Janet Hamilton with RW experts, for those who have run a marathon and log 25 weekly miles. Find other options at runnersworld.com/trainingplans.

WEEK	MON	TUE	WED	THU	FRI	SAT	SUN	TOTAL
1	Rest	3 miles easy	5 miles hills	Rest	5 miles easy	3 miles easy	9 miles LSD	25 miles
2	Rest	3 miles easy	6 miles hills	Rest	6 miles easy	3 miles easy	9 miles LSD	27 miles
3	Rest	4 miles easy	6 miles hills	Rest	6 miles easy	3 miles easy	11 miles LSD	30 miles
4	Rest	4 miles easy	6 miles hills	Rest	6 miles easy	3 miles easy	10 miles LSD	29 miles
5	Rest	4 miles easy	7 miles hills	Rest	6 miles with 2 miles @ MP	3 miles easy	13 miles LSD	33 miles
6	Rest	4 miles easy	7 miles hills	Rest	6 miles with 3 miles @ MP	4 miles easy	14 miles LSD	35 miles
7	Rest	4 miles easy	8 miles hills	Rest	7 miles with 3 miles @ MP	4 miles easy	16 miles LSD	39 miles
8	Rest	4 miles easy	Hill Repeats: 8 miles with 8 hill repeats	Rest	7 miles with 4 miles @ MP	4 miles easy	14 miles LSD or half-marathon	37 miles
9	Rest	4 miles easy	Mile Repeats: 8 miles with 5 x 1 mile	Rest	9 miles with 6 miles @ MP	3 miles easy	18 miles LSD	42 miles
10	Rest	4 miles easy	Yasso 800s: 9 miles with 4 x 800	Rest	10 miles with 7 miles @ MP	Rest	20 miles LSD	43 miles
11	Rest	4 miles easy	9 miles easy	Rest	10 miles with 8 miles @ MP	4 miles easy	20 miles LSD	47 miles
12	Rest	4 miles easy	Mile Repeats: 9 miles with 4 x 1 mile	Rest	7 miles with 5 miles @ MP	8 miles easy	15 miles LSD	43 miles
13	Rest	5 miles easy	Yasso 800s: 10 miles with 6 x 800	Rest	10 miles with 8 miles @ MP	4 miles easy	22 miles LSD	51 miles
14	Rest	5 miles easy	Mile Repeats: 9 miles with 3 x 1 mile	Rest	9 miles with 4 miles @ MP	4 miles easy	16 miles LSD	43 miles
15	Rest	4 miles easy	6 miles easy	Rest	6 miles with 3 miles @ MP	4 miles easy	12 miles LSD	32 miles
16	Rest	4 miles easy	Rest	Rest	Rest	3 miles very easy	RACE DAY	33.2 miles

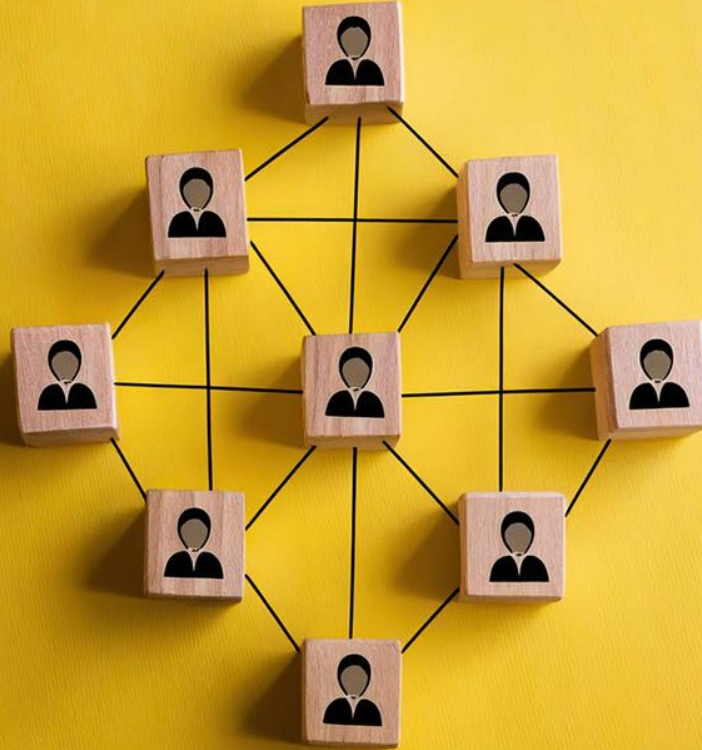
KEY → Rest No exercise at all or nonimpact cross-training, yoga, or swimming. Easy Run at a conversational pace, rest, or cross-train with a sustained aerobic effort. Hills Run the hilliest course you can find, sustaining an even effort as you climb and descend. Hill Repeats Find a hill that takes at least two minutes to climb; mark off a short repeat halfway up from the bottom. Warm up for two miles, then run to the short mark three or four times. Jog down to recover. Then run to the top, jog down to the short mark, then sprint to the bottom (without slipping your feet). Repeat three or four times. Finish with three or four sprints up to the short mark. Cool down with two easy miles. Mile Repeats Warm up for one mile, then run one mile at 10-K pace. Jog a half-mile. Repeat as directed. Cool down with one easy mile. LSD Long, slow distance runs build endurance. Run them at one to two minutes slower than marathon goal pace. MP Marathon goal pace. Warm up for one mile, then run your target speed. Cool down with one easy mile. Yasso 800s Warm up with easy running, then run 800 meters at the given time that's "equal" to your marathon time. So if your goal is a 2:45 marathon and the workout calls for "9 miles with 6 x Yasso 800," run 6 x 800, and run each 800 in 3 minutes and 45 seconds. Recover with 400 meters of jogging and walking. Then repeat the cycle. Cool down with easy running.

Your First Day

Here's when to begin training for one of these fall marathons

MARATHON	RACE DAY	START
Chicago	10/7	6/18
Portland	10/7	6/18
Twin Cities	10/7	6/18
Marine Corps	10/28	7/9
New York City	11/4	7/16
Philadelphia	11/18	7/30

**I get all my
clients
through
referral**



In a growing digital world, the new normal is that by the time a referral walks into your office... they've already “kicked the tires” by first checking you out online.



How your audience judges an online presence

They're researching you online to:

- Determine what you can do for them
- Validate your credentials
- Gain more knowledge



Evaluating the intangibles

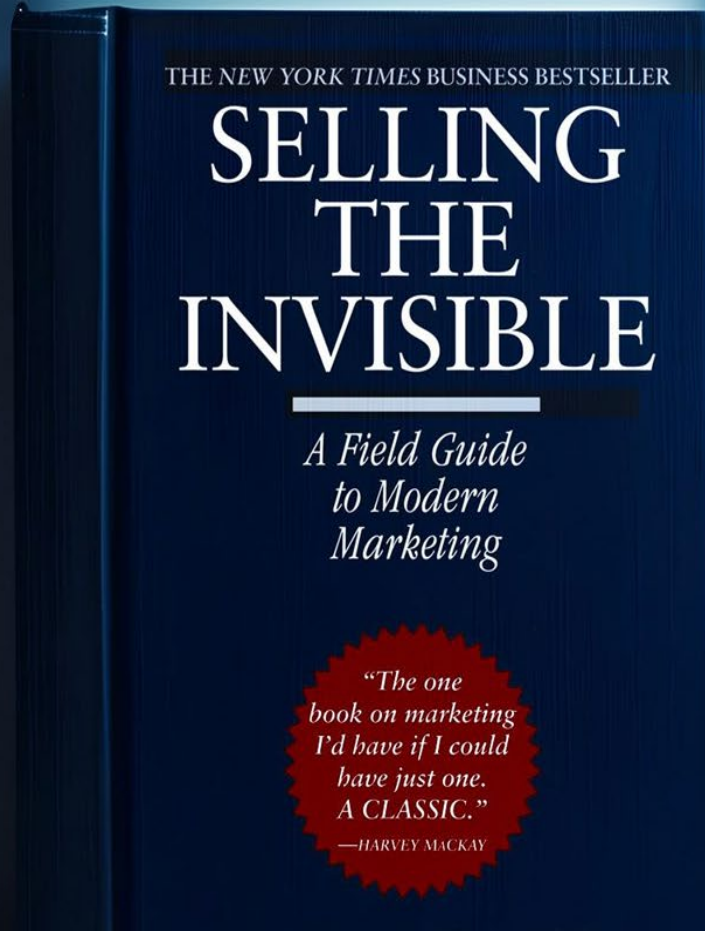
Consumers have an easier time evaluating products because they have a physical presence that can be examined and measured in a number of ways to assess its quality.

Advisors have it a bit tougher...



Advisors have to sell the invisible

Since there is no real way to evaluate the quality of a service or the true depth of an advisor's expertise, the consumer's decision to work with an advisor can be attributed to more **simpler details**.



Simpler details = what is tangible

A prospective client will rather focus on what is “tangible” in your service like...

How you are dressed



The look of your office



Or your WEBSITE



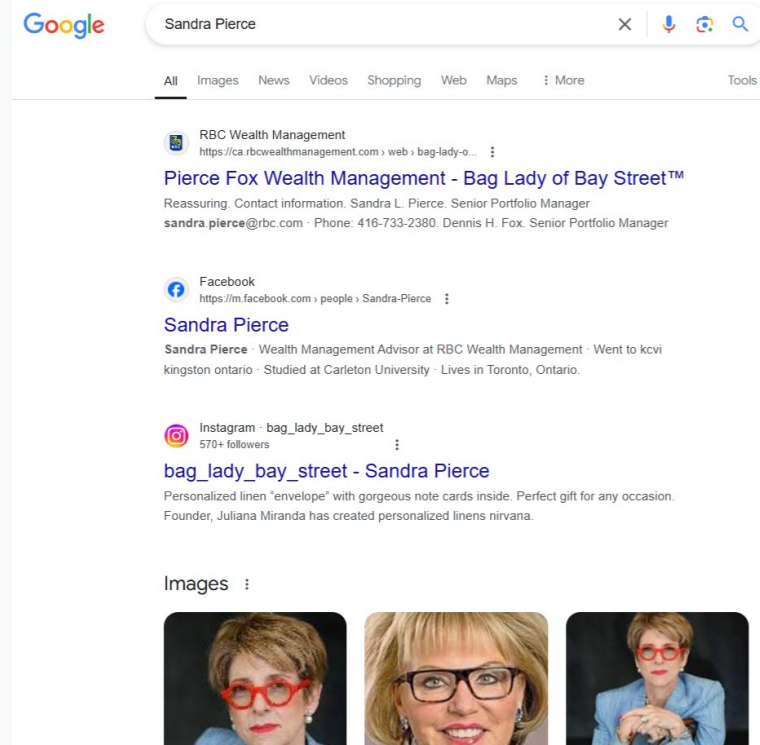
So if advisors are relying on the more **tangible qualities** of your business like your website and presence online...is it leaving a **bad first impression?**

How to make a great first impression online

The background features a faint Veriday logo with a stylized 'V' and the tagline 'YOUR WEALTH TO NEW HEIGHTS' in a light blue color.

Make it easy for prospective clients to find you

- Goal: Top search rank for personal brand search
- What affects search?
 - Relevancy
 - **Do people come to your site?**
 - **Does this website stay updated?**
- Does your website come up first?
- Are you competing with similar sounding firms?
- Social media pages visible?



High Performing SEO Advisor Websites

What you rank for vs. how you rank on a search engine.

On-Page

What is your advisor site about?

Off-Page

How qualified is your site to other parts of the web?

Technical SEO

How strong is the technology behind your website?

On Page Best Practices

1 keyword in the title

2+ keywords in body text

Don't forget alt tags on images

Always add in a meta description



Search Engine Optimization

Search Result Preview

This is a preview of how your page will appear in search engine results

Sara Zollo - Contact Us

advisor.assante.com/web/Sara-Zollo/contact-us

Branch location and other contact information for you to reach us.

Search Engine Title

Sara Zollo - Contact Us

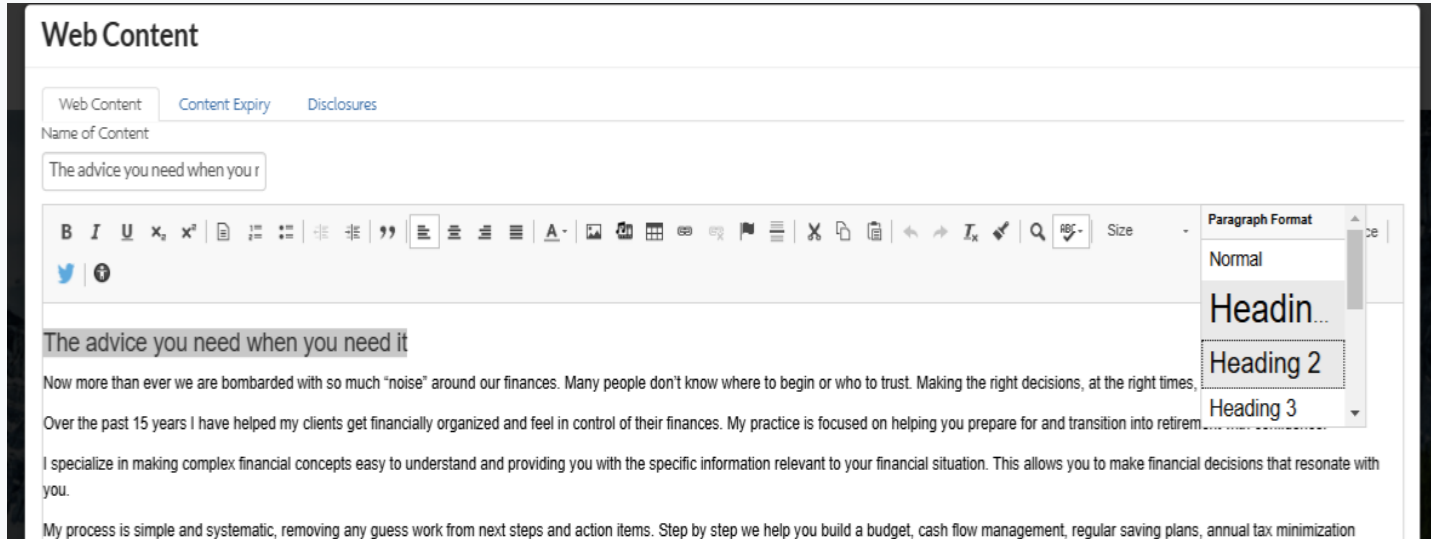
Meta Description

Branch location and other contact information for you to reach us.

Tags

Header Tags

Headers (i.e. Heading 1, 2, 3 etc.) are the unique headlines on each page that position the key topics for your reader and search engines.



The screenshot displays a web content editor interface. At the top, there's a title "Web Content" and three tabs: "Web Content", "Content Expiry", and "Disclosures". Below the tabs, there's a label "Name of Content" and a text input field containing "The advice you need when you r". A rich text editor toolbar is visible, featuring various icons for text formatting (bold, italic, underline, strikethrough, subscript, superscript), alignment, bulleted and numbered lists, indentation, link, unlink, table, media, and undo/redo. A dropdown menu for "Paragraph Format" is open, showing options: "Normal", "Headin...", "Heading 2", and "Heading 3". The text "The advice you need when you need it" is highlighted in the editor, and the "Heading 2" option is selected in the dropdown. Below the editor, there are three paragraphs of text:

The advice you need when you need it

Now more than ever we are bombarded with so much "noise" around our finances. Many people don't know where to begin or who to trust. Making the right decisions, at the right times,

Over the past 15 years I have helped my clients get financially organized and feel in control of their finances. My practice is focused on helping you prepare for and transition into retirement.

I specialize in making complex financial concepts easy to understand and providing you with the specific information relevant to your financial situation. This allows you to make financial decisions that resonate with you.

My process is simple and systematic, removing any guess work from next steps and action items. Step by step we help you build a budget, cash flow management, regular saving plans, annual tax minimization

Internal Links

Helps your audience navigate from page to page and makes it easier for search engines to crawl the entire site.

The screenshot shows the top navigation bar of the Blue Whale Financial Solutions website. The logo "BLUE WHALE FINANCIAL SOLUTIONS" is on the left, and a "Home" button is on the right. Below the navigation bar, there are three content cards. Each card features a photograph of a client meeting, a title, a short paragraph of text, and a "Learn more" button.

BLUE WHALE
FINANCIAL SOLUTIONS

Home

Business owners

We don't know what the future holds. That's why a plan to protect your business and employees is so important. We provide an extensive range of products and services to help set your business up for success. Because every business is unique, we tailor each aspect of your plan specifically to your need.

Professionals & retirees

A comfortable future requires planning. But it doesn't mean you can't enjoy yourself in the meantime. When you work with us, we help you reach your ideal future in a realistic and sustainable way. We prepare you for financial risks and help you make decisions with confidence.

Fami

Growing an and your fa easy. But w side, it's pos insuran investmen lifet

Learn more

Learn more

To be successful in digital marketing today, you simply can't just have a static online presence.

You also have to invest in an inbound marketing strategy.



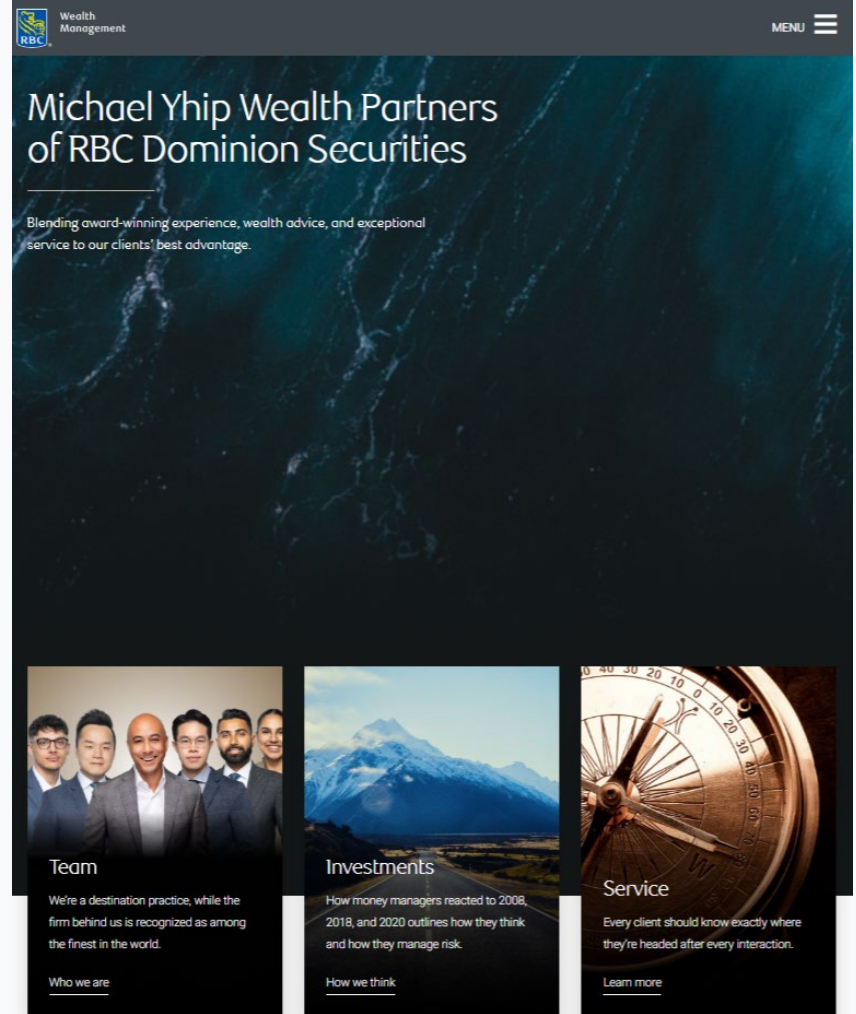
Keep your website simple

Logo: Prospects spent 6.5 seconds

Navigation: 6.4 seconds

Main image: 5.94 seconds

Written Content: 5.59 seconds



Go easy on the content

For example: A “wall of text” overwhelms users, reduces readability, and deters engagement, making it harder to convey your message effectively.



So to recap..

Ensure your site is aesthetically pleasing to leave a great first impression

Make the time for in page and off page items such as inbound marketing to remain relevant with your niche

Generating leads on the website



Calendly Integration



Tim Merrill

60 Minute Meeting

🕒 1 hr

Select a Date & Time

< November 2024 >

SUN	MON	TUE	WED	THU	FRI	SAT
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

Time zone

🌐 Eastern Time - US & Canada (4:25pm) ▼

POWERED BY
Calendly

Primary & Secondary CTA's

Name*

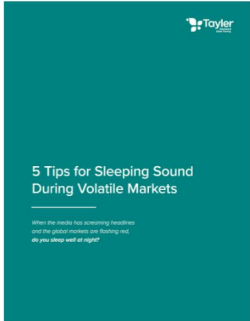
E-mail Address*

Telephone*

Questions or Comments*

Please be advised that any information sent through this Contact Us page is not considered secure and privacy can not be ensured. Therefore, we ask that you not include any confidential information such as bank account numbers, credit card numbers, or other account details.

Submit




Gain Access to our: 5 Tips for Sleeping Sound During Volatile Markets.

When the media has screaming headlines and the global markets are flashing red, do you sleep well at night? Download our eBook today!

Name

Email Phone

Yes I would like a copy of this eBook.



Q&A





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tim.merrill@veriday.com

Past blogs and webinars:

<https://digitalagent.com/blog/>