WealthReach

Advisor Website Best Practices

A practical reference for advisory firms. These are the checks that decide whether a firm's website wins new clients from search and AI tools, drawn from recurring patterns across hundreds of advisor site audits.

THE FUNDAMENTALS

01 Every page needs its own title tag and meta description.

The title tag is the blue headline in a Google result and the meta description is the text beneath it. Each page should carry a unique title of roughly 50 to 60 characters and a purpose-written description of 150 to 160 characters. When many pages share one title, Google treats the pages as interchangeable and shows almost none of them.

02 Check for noindex tags before anything else.

A noindex tag tells Google to keep a page out of search results entirely. It belongs on thank-you pages and drafts, but theme and plugin misconfigurations regularly apply it to core pages. Advisor sites routinely have About, Team, and service pages noindexed. Until noindex is removed, nothing else on this list matters.

03 One page per topic, with one clear H1 on it.

Duplicate pages such as About and About Us, or Team and Our Team, split ranking signals and confuse search engines about which version to show. Pick one canonical URL per topic and redirect the duplicates into it. Each page then needs exactly one H1, the main on-page headline, stating what the page is about in the words a prospect would search.

04 Build a dedicated, indexed page for each core service.

Prospects search for services before they know a firm exists. Terms like fee only financial advisor and retirement planning carry thousands to hundreds of thousands of monthly searches. A firm can only compete for a term when a specific indexed page targets it. A homepage mention or a passing blog reference does not substitute.

05 Depth wins on pages meant to rank.

Service and topic pages should run 800 words or more of specific, useful content. A 300-word template page rarely ranks for anything. Many advisor sites already have strong long-form blog writing; the gap is that the commercial pages never received the same effort.

06 Organize the blog like a library, not a pile.

Blog posts filed under a single uncategorized bucket tell search engines nothing about what the firm covers. Give every post a real category, a named author, and a descriptive URL. Categorized archives become indexable topic hubs that compound over time.

07 AI search reads the same signals, so let it in.

ChatGPT, Perplexity, and Google's AI Overviews rely on the same indexing and markup as traditional search, so a noindexed page is invisible to them too. Firewall and bot-protection settings also block GPTBot, ClaudeBot, Google-Extended, and other verified AI readers by default; check the rules and let them in.

08 Schema markup should name people and credentials.

Schema is structured data that describes a site to machines. Organization markup should appear sitewide, and each advisor needs Person markup with credentials such as CFP or CFA attached. AI systems can only cite qualifications the markup states.

09 Publish a real bio for every team member.

Bios are what search and AI tools cite when someone asks who runs a firm. Every team member needs one, and credentialed members especially: name, credentials, role, and specialties on an indexed page.

10 Embed client reviews on the site itself.

Reviews that live only on a Google profile do not strengthen the website. Embedded on the site, within the firm's compliance requirements, they become trust signals both Google and AI readers can see and cite.

11 Never reuse templated content across firms.

AI systems detect when a site's copy is identical to the advisor's down the street, which is common with template vendors. Duplicated copy gives a machine no reason to cite one firm over another; every core page should be written for that firm.

12 A few legitimate links beat a pile of weak ones.

Purchased or spammy links are a net negative. Aim instead for a few clean local and industry citations: chamber of commerce, CFP and fiduciary directories, local press.

13 Ranking for your own name is table stakes, not growth.

Brand searches only reach people who already know the firm. Real growth comes from ranking for the services prospects search first, not the firm name.

See how your site grades

Scan the code or visit wealthreach.ai to request a complimentary audit of your firm's website. The audit grades your site on everything in this guide, from indexing and titles to AI visibility, and shows exactly what to fix first.