PRACTICE MANAGEMENT SYMPOSIUM

Growing Your Advisory Business in the AI Era

The new front door. How clients find, vet, and choose a financial advisor now.

Dan Allison | David DeCelle | Michael Barrasso

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WealthReach

Who you will hear from today



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What we will cover

01 How people find help now

02 How prospects decide now

03 The gap in our industry

04 How to get found

05 From visitor to meeting

06 Live website audit

07 Your questions

How people find help now

01

Search used to return a list. AI returns an answer.

The search era

- A prospect types a query and gets a ranked list of links
- Firms with budget optimized to reach the top of page one
- On page four, the only way to be found is if someone already knows your name

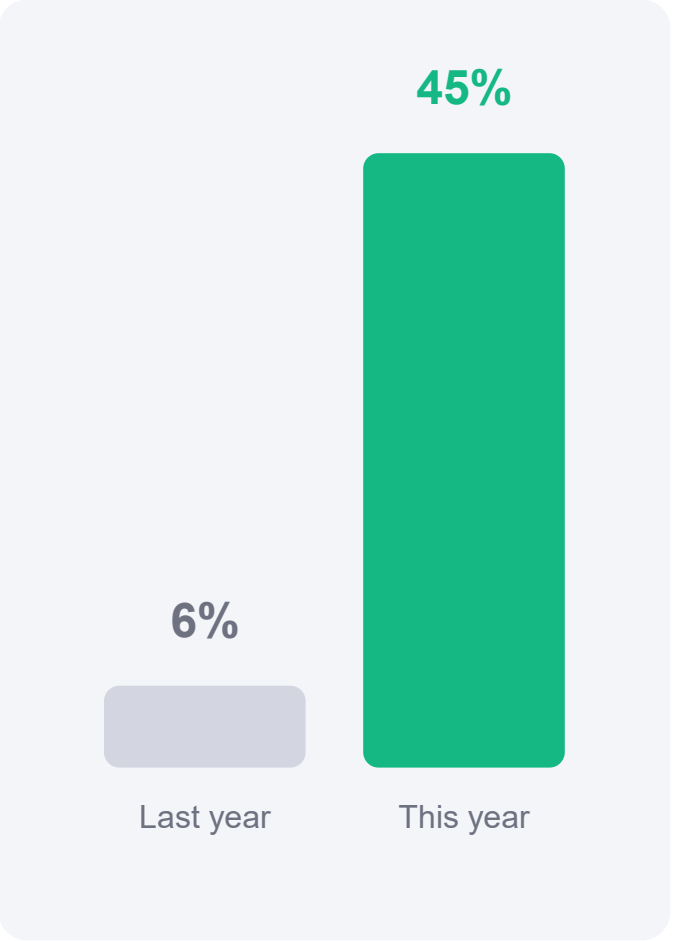
The AI era

- A prospect describes what they need to ChatGPT, Claude, Perplexity or Gemini
- The tool reads across the web and names two or three firms
- There is no page two. You are in the answer or you are not

ONE YEAR APART

6% → 45%

of consumers now ask AI tools for recommendations on local businesses. That jump took one year.

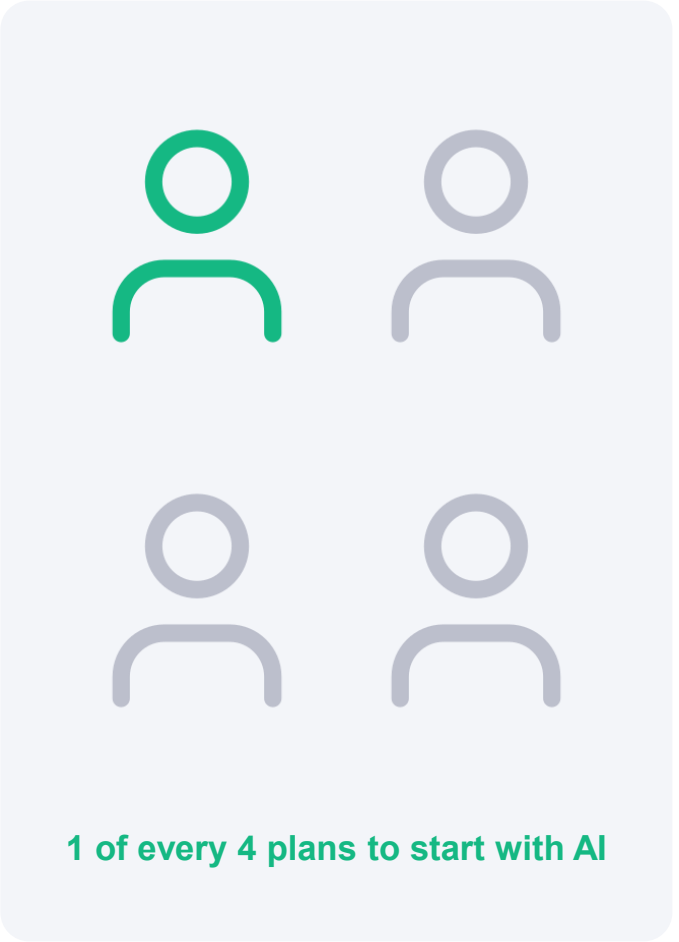


Source: BrightLocal consumer survey

YOUR PROSPECTS SPECIFICALLY

1 in 4

affluent prospects plan to start their advisor search with an AI tool like ChatGPT.



Source: Wealthtender, Aug. 2025

An AI recommendation lands like a referral

People build trust in these tools through daily use, so a suggested firm arrives with credibility a search listing never had.

The prospect asks

They describe their situation in their own words, often in detail.

The AI reads the web

It scans websites to find the best answer for its user, reading structure and content, not design.

A firm is recommended

The prospect treats that suggestion with the trust they have built in the tool.

A website can look polished and read well to a person, and still give an AI tool nothing it can use.

Advisors adopted AI inside the firm. Prospects adopted it outside.

Inside your firm

63%

of RIAs now use AI for notes, emails and meeting prep.

Source: Schwab

Outside, where clients shop

Most

advisor firms never show up in AI answers.

Source: WealthReach audits

Quick show of hands



Who has booked an appointment through your website in the last 60 days?

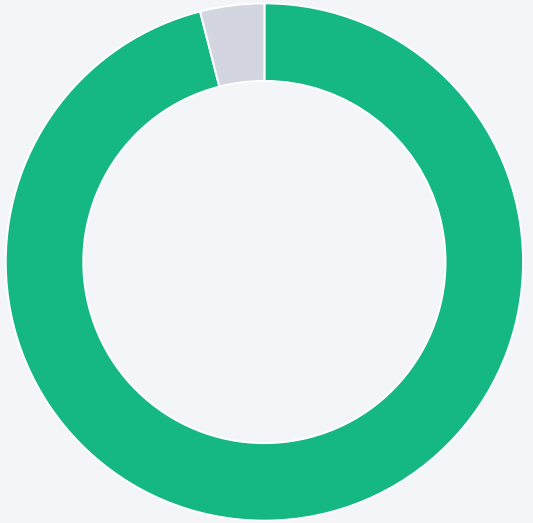
How prospects decide now

02

THE REFERRAL YOU NEVER HEAR ABOUT

96%

would still research an advisor online, even after a strong recommendation.



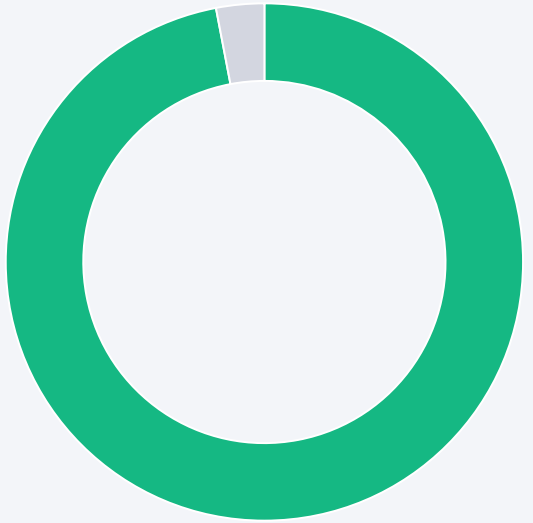
Look you up first

Source: Wealthtender

AND YOU HAVE COMPANY

97%

plan to interview more than one advisor before hiring. Nobody gets hired uncontested anymore.



Compare you to someone else

Source: Wealthtender

Four things they check before calling you

83%

Check your reviews and reputation

The first step for most prospects

72%

Visit your website

To see whether you are a fit

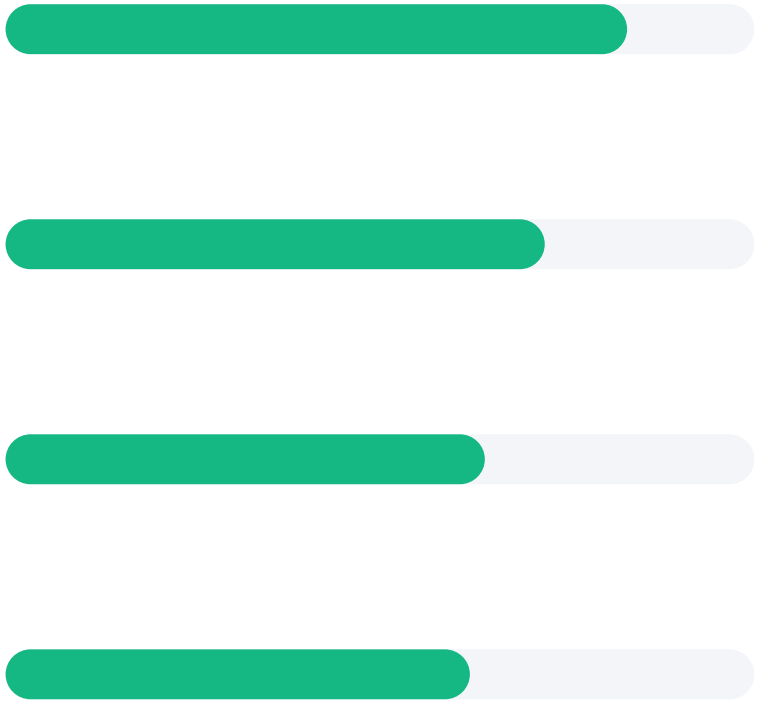
64%

Look for proof you serve people like them

62%

Want to understand fees

Before they reach out

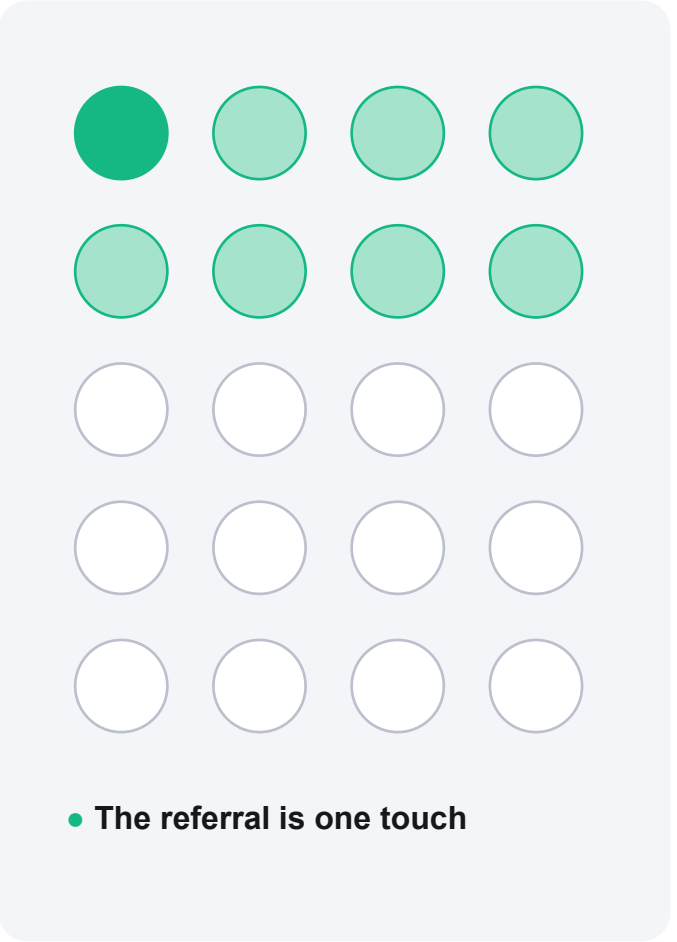


Source: Wealthtender

THE OLD RULE OF SEVEN GREW UP

8 to 20

quality touches with your name before a modern buyer feels ready. A referral is exactly one of them.



Source: FPA Journal

THE REFRAME

A referral used to be the end of the sale. Now it is the start of an investigation.

Prospects switch on credibility, not price

57%

of advisors signed new clients specifically because a competitor's technology and online presence looked outdated.

Source: Advisor360

44%

of pre-retirees would choose the provider who looks more credible, even when the competing offer has a better rate.

Source: Annuity.org

The gap in our industry

03

AI is becoming the newest center of influence

An AI recommendation arrives with borrowed trust, much like an introduction from a CPA or attorney.

CPA

Recommends you because they have seen your work

Attorney

Recommends you because they trust your judgment

AI assistant

Recommends you only if it can read and verify who you serve

You have a plan for your CPA and attorney relationships. Most firms have no plan for this one.

Prospecting that does not depend on asking

Many advisors are uncomfortable asking clients for introductions. A visible website brings in people who are already searching.



Referrals

Still the strongest source of new clients, and they depend on the advisor starting a conversation.



AI visibility

The prospect starts the conversation. The firm's job is to be the answer when they ask.

Most advisors appear only when searched by name

Across our audits, very few advisor websites show up in their local market when prospects ask AI for help.

What a prospect asks AI

“I'm retiring in two years and selling my business. Who near me can help with the tax side and the income plan?”

Result for most firms

Not mentioned

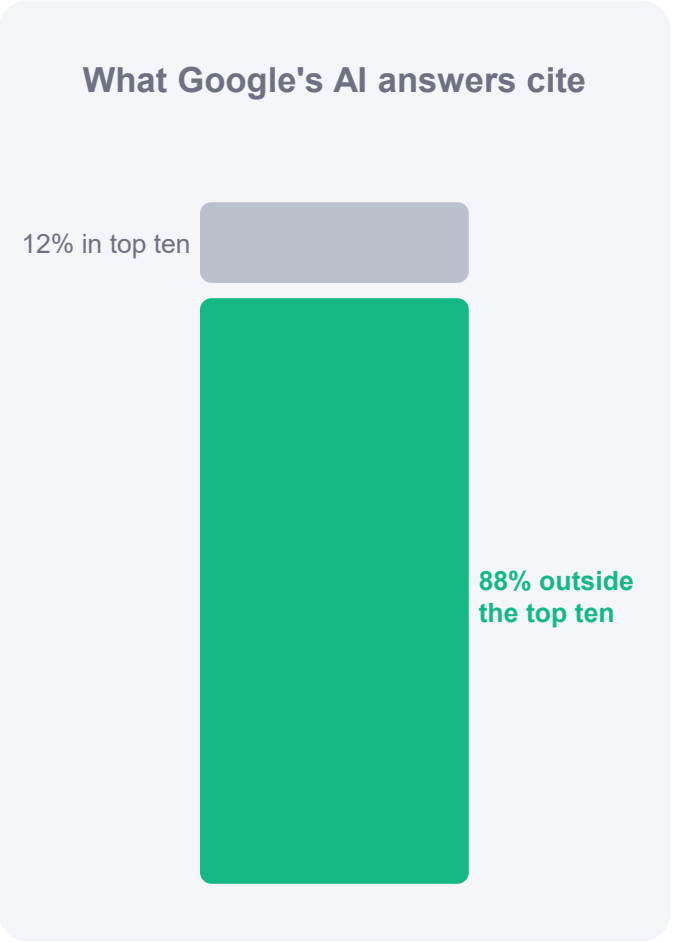
They appear only when a prospect already types the firm's name.

Millions of people are already asking for help. Only a small share of firms are eligible to be the answer, because their websites were built for the search era.

TWO DIFFERENT GAMES

88%

of what Google's AI answers point to never appears in Google's top ten results. Ranking and being the answer are different games.



Source: Moz, 40,000 query study

The average advisor website is failing quietly

What came back from 30,000 advisor websites audited over the past year.

D

The average grade across all 30,000 sites audited

Zero

Times the majority of firms are mentioned in AI answers

64 of 98

Sites in our latest hand-graded batch that ranked for another firm's name

Source: WealthReach audit data

None of this is visible from your own homepage

The site never says the city

A good-looking homepage, and no page that tells Google or AI where you actually work.

Page titles still say the template's words

Pages titled “Home” or the theme's demo text instead of what you do.

Credentials software cannot see

CFP, fiduciary, 20 years of practice: visible to people, invisible to software.

The same article as 1,000 other advisors

Template libraries publish identical pieces. Google skips duplicates, and so does AI.

How advisors buy websites today

Two options, and both skip the foundation.

OPTION 1

The legacy providers

Fast and affordable. Templated layouts and the same article library as thousands of other firms.

Costs less. Worth less.

OPTION 2

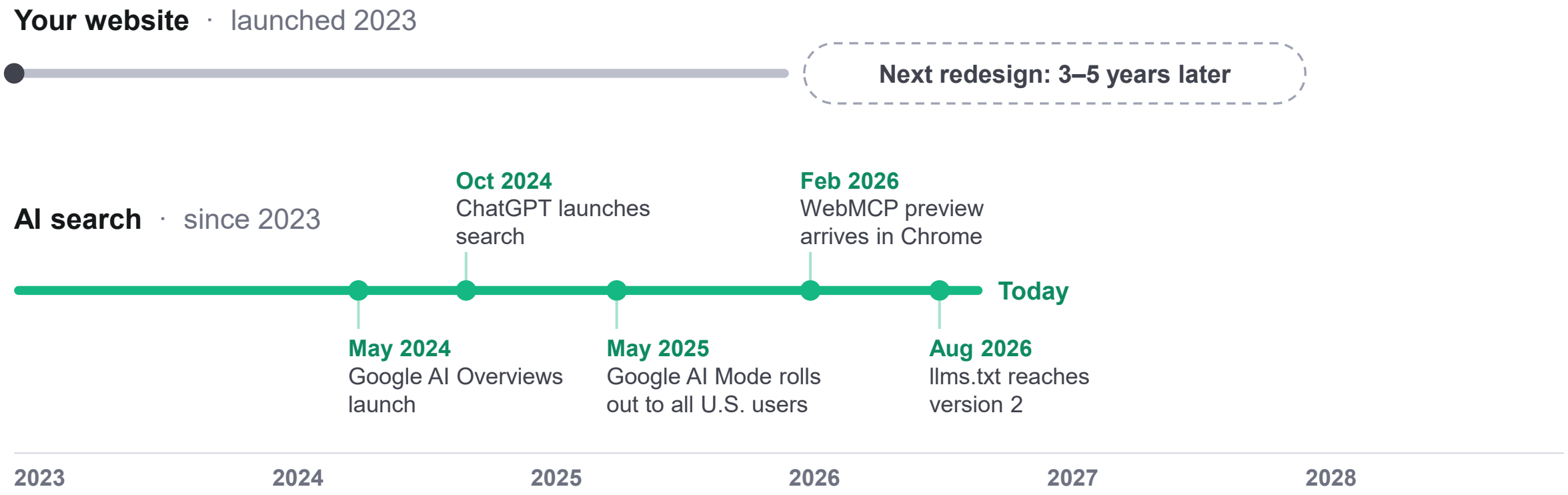
The big-budget agency

$30,000 to $100,000 for a beautiful custom site, designed to impress the people who already found you.

Beautiful, and never seen.

Either way, you get a poster board

You'd never leave a client's portfolio untouched for five years. Most firms do exactly that with their website.



Sources: Google · OpenAI · Chrome for Developers · llmstxt.org. Redesign cycle based on what we see across advisor firms.

THE MYTH THIS CREATED

“Clients with real assets don’t look for an advisor online.”

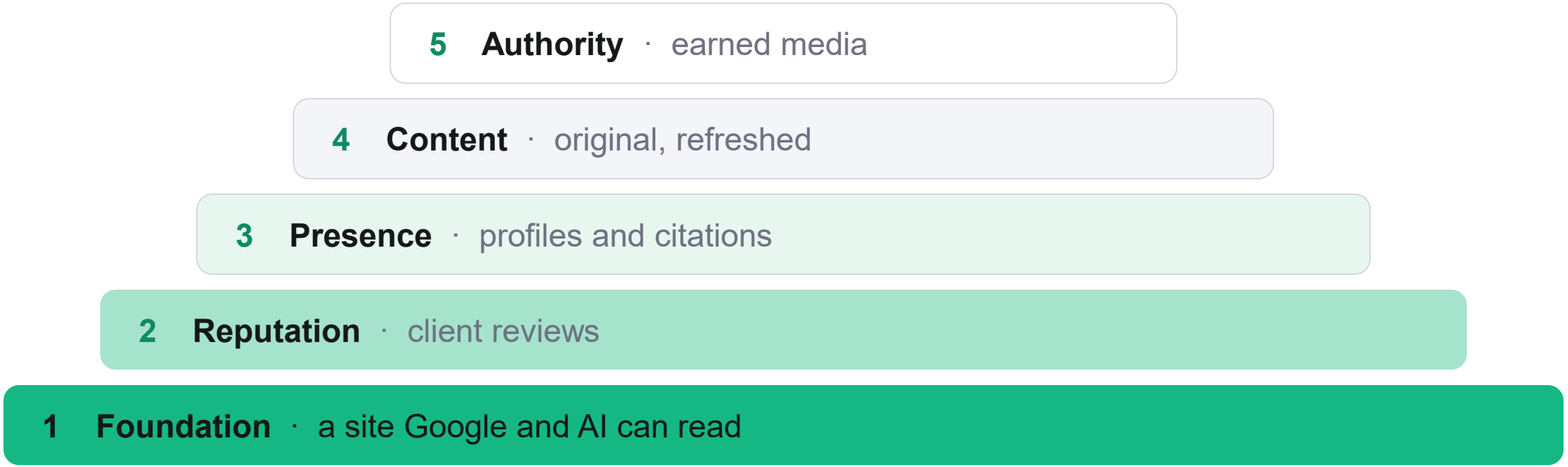
They do. They just can’t find you.

How to get found

04

Five layers, in build order

Each layer makes the next one work. Skip the foundation and nothing above it holds.



Then: convert the visitors you earn into booked meetings.

A site Google and AI can actually read

Layer 1 · Foundation Six things most advisor sites get wrong. Every one is fixable.

1

Schema markup

Machine-readable labels for who you are, where, and what you do.

2

Header structure

One H1 that matches the title. H2s and H3s like chapter titles.

3

Unique titles

A distinct title and meta description on every page.

4

Readable without scripts

Key facts in the page text, not in tabs, images or PDFs.

5

The right bots let in

Check that your host or firewall isn't blocking AI crawlers.

6

Fast on a phone

From 1 to 3 seconds of load time, mobile bounce risk rises 32%.

Sources: Microsoft, Oct. 2025 · Google Search Central, July 2026 · Vercel + MERJ, Dec. 2024 · OpenAI · Google/SOASTA, 2017.

From a site AI reads to a site AI uses

Layer 1 · The fix for the poster board Build the foundation once. Then keep the site growing, every month.

KEEP IT GROWING, EVERY MONTH

New pages for new questions

Each time clients ask something new, answer it on your site.

Refresh what ranks

Update pages as rankings and AI answers shift.

Watch what AI says about you

Check how ChatGPT, Claude and Gemini describe your firm.

ADOPT NEW AI STANDARDS

LOW COST · DO IT NOW

llms.txt

A plain-text fact sheet AI can read in one pass. A cheap early bet, not a ranking factor.

EARLY · WE'RE TESTING IT NOW

WebMCP

Lets an AI agent act on your site, like booking an intro call. In early trials.

Like a portfolio: set the strategy once, then rebalance as the market moves.

Sources: llmstxt.org · Google Search Central, July 2026 · W3C WebMCP draft, Oct. 2026 · Chrome and Edge origin trials.

AI recommends the advisor who speaks to the problem

Layer 1 · What your site says AI looks for the best answer for its user. A service menu doesn't give it one.

THE GENERIC SERVICE MENU

- Retirement planning
- Investment management
- Tax planning
- Estate planning

Accurate, and identical to the firm next door.

SPEAKS TO ONE IDEAL CLIENT

For business owners selling in the next three years

Who it's for: owners planning an exit

Their pain: a big tax bill, then no paycheck

How you solve it: pre-sale tax and income planning

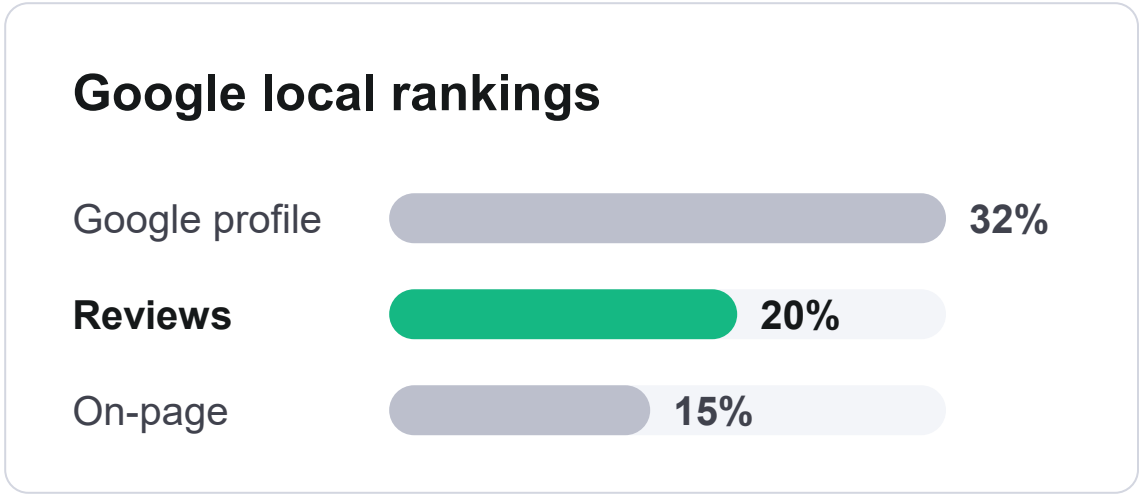
Specific, and exactly what that prospect wants.

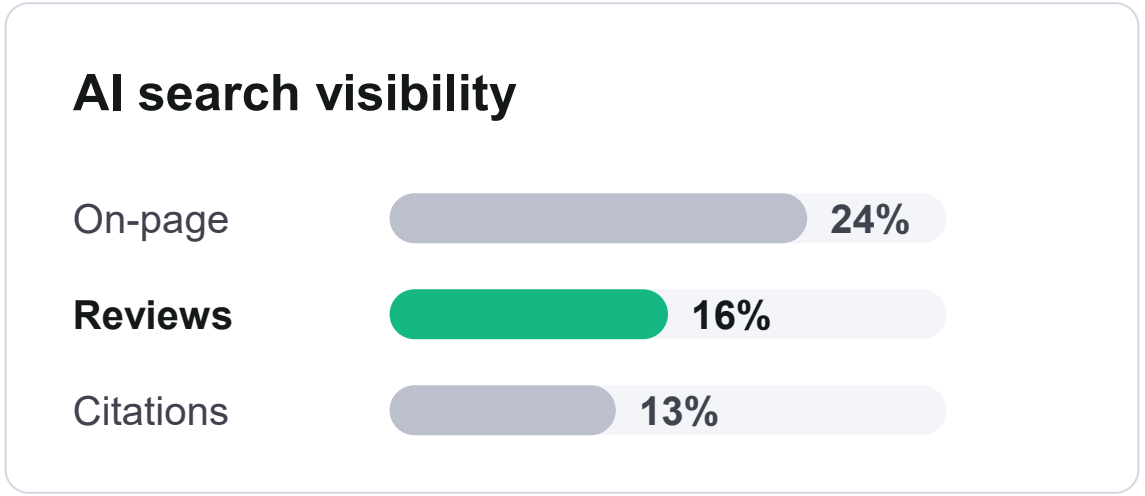
"Who near me can help with the tax side and the income plan?" **Only one of these pages answers it.**

Example pages illustrative.

Reviews are the #2 signal, for Google and for AI

Layer 2 · Reputation What the top local-search experts say drives visibility.





74%

of consumers want reviews from the last three months.

~1 in 10

SEC-registered advisers use testimonials, four years after the rule allowed them.

Sources: Whitespark Local Search Ranking Factors 2026 (expert survey) · BrightLocal 2026 · IAA/COMPLY Snapshot 2026.

Collect once. Show up everywhere

Layer 2 · Reputation Google first, then a compliant review platform, then the AI answers.

1 · COLLECT

Google reviews

Powers your local rankings and Google's AI Overviews.

2 · IMPORT

Wealthtender

Adds compliance disclosures before anything publishes.

3 · GET CITED

AI answer engines

We often see Wealthtender cited in ChatGPT and Claude.

Drip, don't dump: make asking a habit

- **Kick off** with one email to your whole client base
- **Ask** as a standard step in every review meeting
- **Add** a "Leave a review" link to every newsletter
- **Automate** a gentle request every few months

Ask every client the same way. No incentives, no cherry-picking, never hide negatives. Check with your CCO before featuring reviews in marketing.

One profile for every office

Layer 3 · Presence Each location gets its own Google Business Profile, with its own reviews, photos and updates.

188

Google Maps citations for every 1,000 “best of” local questions asked in ChatGPT.

Your Google profile is feeding the AI.

Your Firm · Main office
★★★★★ 4.9 · 64 reviews · Financial planner

Your Firm · Second office
★★★★★ 4.8 · 31 reviews · Financial planner

Your Firm · Third office
★★★★★ 5.0 · 18 reviews · Financial planner

Then claim the rest of the internet

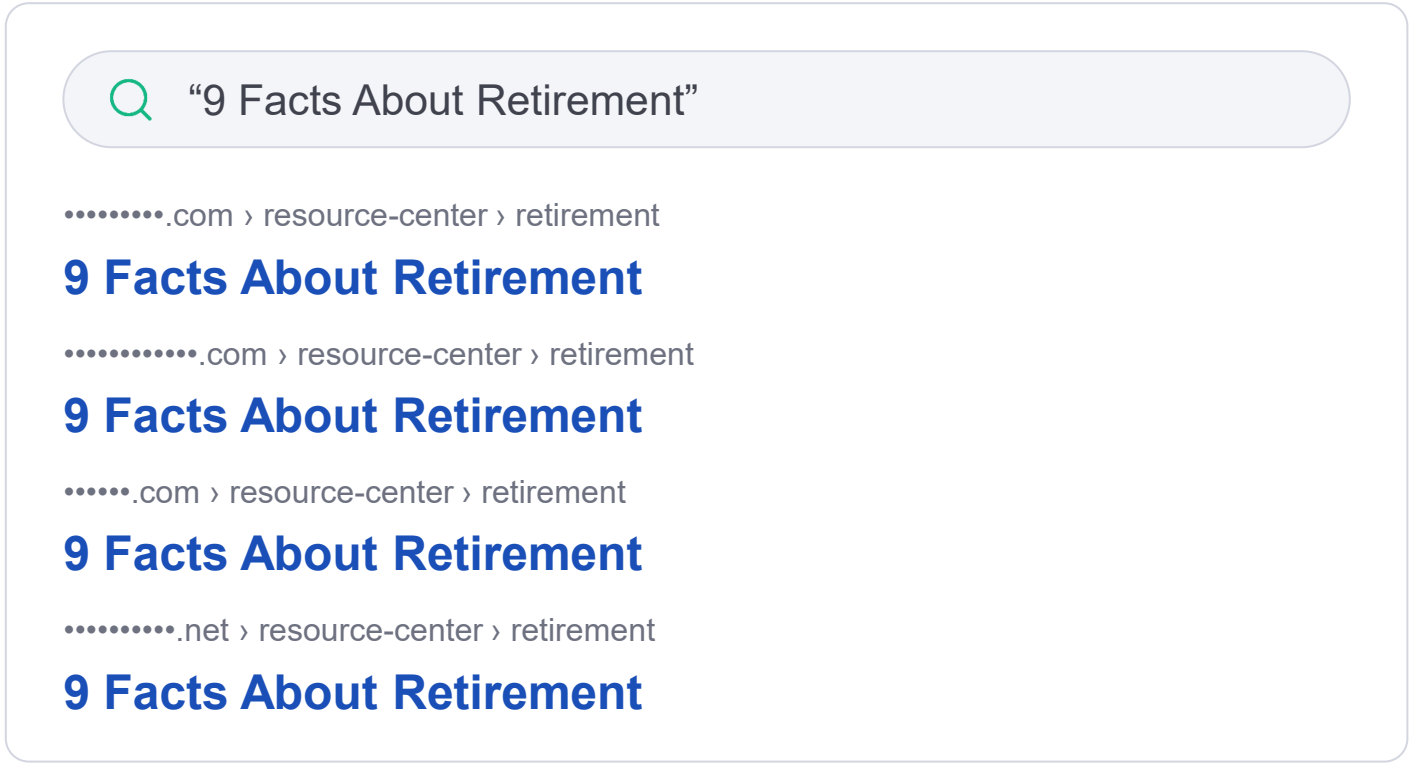
- Bing Places
- Apple Business
- Better Business Bureau
- Yelp
- Wealthtender
- Industry directories

Illustrative profiles. Sources: Muck Rack, “What Is AI Reading?” May 2026 · Google Business Profile guidelines · Whitespark 2026.

Same article. Thousands of websites

Layer 4 · Content Google doesn’t penalize duplicates. It picks one copy and filters out the rest.

Search the title of a provider’s library article and you get the same piece, the same URL path and the same footer, with a different advisor on every line.



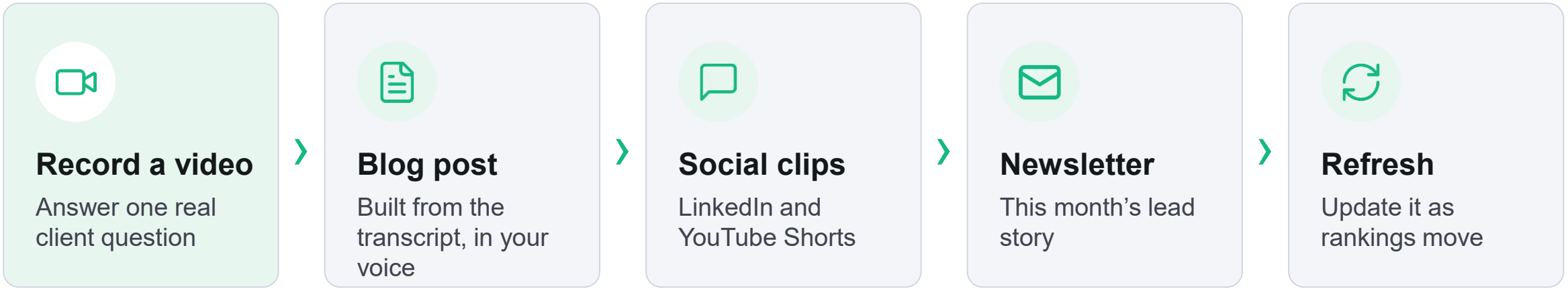
Compliant isn’t the same as findable.

AI has no reason to cite the thousandth copy of the same article.

Domains hidden. Same text and FMG footer confirmed on 10+ advisor sites, Oct. 2026 · Google Search Central · J. Mueller.

Make one thing. Use it five ways

Layer 4 · Content One real client question becomes five assets, and a reason for AI to cite you.



#1

YouTube is the most-cited site in Google's AI Overviews.

~26% fresher

Pages AI assistants cite are newer, on average, than Google's organic results.

Sources: Ahrefs, most-cited domains in AI Overviews, Sept. 2026 (3M+ queries) · Ahrefs, freshness of AI citations, July 2025 (17M citations).

AI believes what others say about you

Layer 5 · Authority You can’t buy your way into the AI answer. Other people have to cite you.

84%

of the links AI cites are earned media.

Paid placements: 0.3%.

Guest posts

Write for the industry, local and niche publications your ideal clients read.

Quotes to reporters

Answer journalist requests on Qwoted and Featured (now home to HARO).

“Best of” lists and podcasts

Curated lists are among the top AI visibility factors.

Finance has the #2 journalism-citation rate of 17 industries AI answers cover.

Sources: Muck Rack, “What Is AI Reading?” May 2026 (25M+ links) · Univ. of Toronto, arXiv 2509.08919 · Whitespark 2026.

From visitor to meeting

05

Traffic isn’t the goal. Meetings are

Everything so far gets people to your site. These are the four jobs it has to do once they arrive.

Capture

A newsletter offer when a visitor goes to leave.

Watch

Heat maps and session recordings show where people drop off.

Book

A short routing form, then the right advisor’s calendar.

Follow

Retargeting and nurture for everyone not ready yet.

Remember the 97%: they plan to interview more than one advisor. Your website has to win that comparison before you ever get on the phone.

Source: Wealthtender, “How Americans Find and Hire Financial Advisors,” Aug. 2025 (n=500, ages 35–64, household income $100K+).

Route them, then hand them a calendar

From ready to booked in one sitting, before they open another tab.

1

Visitor is ready

Clicks “Talk to an advisor”

›

2

Routing form

Three quick questions: assets, situation, location

›

3

Right calendar

Routed to the right advisor’s calendar

›

4

Meeting booked

Booked on the spot

FILLED THE FORM, DIDN’T BOOK

Track them: retargeting ads + nurture emails

~7× more likely to qualify a lead when you respond within the hour

2 in 3 qualified prospects book when a calendar appears right after the form

Sources: Oldroyd, McElheran & Elkington, HBR, March 2011 · Chili Piper Form Conversion Benchmark, Feb. 2025 (vendor data, ~4M form fills).

Paid ads work best on people who already know you

Retargeting is the accelerant, not the foundation.

MONDAY

Reads your page on Roth conversions. Leaves.

›

THURSDAY

Sees your ad on LinkedIn or YouTube.

›

NEXT WEEK

Comes back and books a call.

+14.6%

more visitors came back within four weeks when retargeting was switched on, in a randomized field experiment. A third of the first week's lift came on day one.

Source: Sahni, Narayanan & Kalyanam, Journal of Marketing Research, 2019 (online retailer; randomized test).

Three fixes this week. No hiring required

1

Ask AI about you

Type your ideal client’s question into ChatGPT, Claude, Gemini and Perplexity. Who shows up? What does it say about you?

2

Send one review email

To your whole client base, with a direct Google review link. Run the wording past compliance first.

3

Claim every profile

A complete Google Business Profile for every office: services, hours, real photos, one post.

Website audit

06

Eight questions, all in plain English

1. Can Google read every page?
2. Can AI tools read the site?
3. Does it say who you serve, and where?
4. Do you own your own name in search?
5. What do you rank for, honestly?
6. Is the content yours, or a template's?
7. Can software see your credentials?
8. Who is winning your market instead?

Does it work?

Results from firms that rebuilt their websites for AI visibility.

53%

Average increase in website traffic in the first 60 days

$300M+

In prospect assets booked onto our advisor clients' calendars

30,000+

Advisor website audits run to build the system

10

Booked appointments in one advisor's first two weeks

Source: WealthReach client data

Questions?

07

Two ways to keep going

Get your website audited

Submit your URL today, and your audit can be discussed over breakfast tomorrow.

Ask a question we did not get to

We will record a video answering every question, and Dimensional will share it with all attendees.

Thank you.

wealthreach.ai

Find us in the prefunction space after the session and at breakfast tomorrow.