

Website Growth Checklist for Financial Advisors

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Why This Matters

Your website is no longer just a digital brochure — it's your **24/7 growth engine**. A high-performing site helps you:

- Get discovered via **Google and AI search**
- Build trust with your ideal audience
- Turn visitors into leads — consistently

🔑 Key Action Areas Checklist

1. 🎯 Clarify Your Target Client

- ☐ Define who you serve best (niche or persona)
- ☐ Understand their goals, concerns, and motivations
- ☐ Align your message and site structure around them

2. 📝 Build Trust-Based Content

- ☐ Use the **Pain → Solution → Credibility** model
- ☐ Share valuable resources (eBooks, checklists, guides)
- ☐ Answer common questions, and showcase your expertise

3. 🛠️ Create Conversion Opportunities

- ☐ Display **client testimonials or reviews** prominently
- ☐ Use clear calls-to-action (Schedule a call, Download guide)
- ☐ Offer a lower-commitment option for early-stage visitors

4. Optimize for SEO & AI Discovery

- ☐ Aim for **70+ mobile / 90+ desktop** on [Google PageSpeed Insights](#)
- ☐ **Structure your content and use internal links** to support your most important pages and improve navigation
- ☐ Go deeper than one page per niche — create supporting blog posts, FAQs, and resource pages.
- ☐ Chat with AI engines, asking for financial advisor recommendations and then follow up for why they named certain firms over others.
- ☐ Test Google's new ai-focused search engine experience at <https://google.com/ai> and see if you're mentioned for important queries.

5. Improve Visual User Experience

- ☐ Use **real, professional photos** of you and your team
- ☐ Add a **video welcome or explainer** to build rapport fast
- ☐ Show **trust badges** (CFP®, fiduciary, fee-based, etc.)

6. Track & Improve

- ☐ Ask every lead: "How did you find me?"
- ☐ Use [Google Search Console](#) to track impressions/clicks
- ☐ Boost ranking pages with new supporting content + links

First Step

Start with your **core message**: Who you help, how you help them, and **why you're the best option** to work with. Your unique differentiators could include a range of items including your expertise, experience, process, business model, cost structure, work ethic, values, trustworthiness, availability, role in the community, or something else.

Carefully plan your content *before* your design. A well-written and well-structured site is always better than a flashy design-first site that lacks substance.

Assess Your Site: Run your website audit in seconds for free at TopRankedAdvisor.com to learn what's holding back your website. Remember Technical Performance + Relevancy + Authority are the three core areas you need to excel at to turn your site into a business growth machine.