



WEBSITE DESIGN BEST PRACTICES FOR MORE CONVERSIONS IN 2022



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Chief Evangelist, FMG Suite



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**Chief Marketing Officer,
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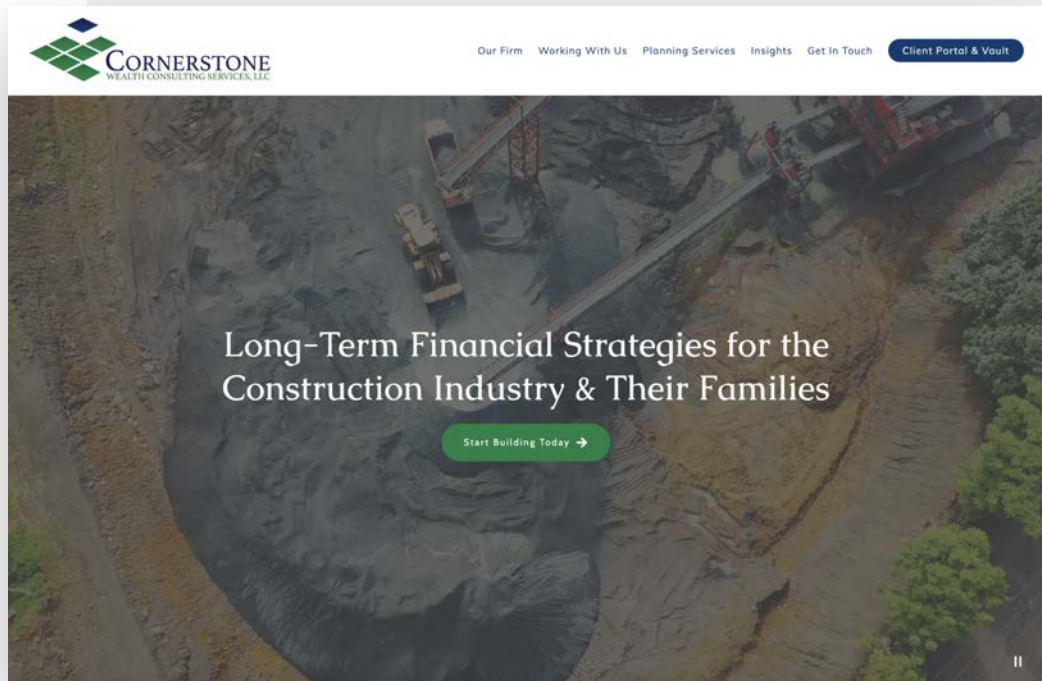
**1st: Does Your Website
Pass the 5 Second Test?**

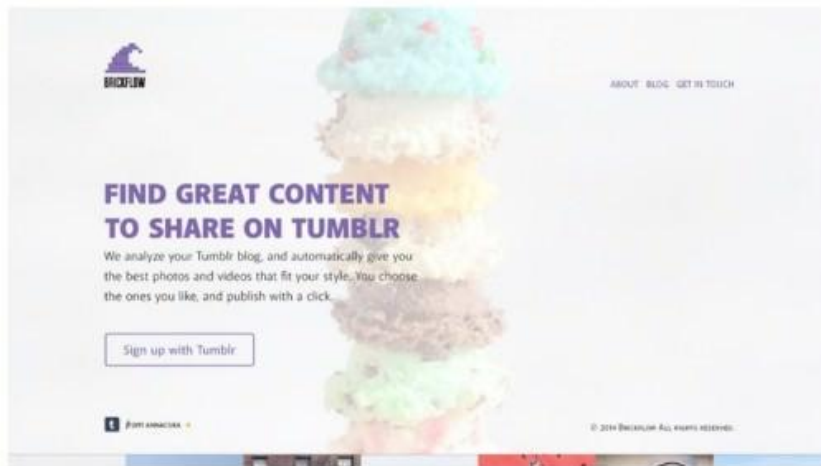
The 5 Second Test

Show user homepage for
5 seconds

Ask:

- What was the page about?
- What do you remember seeing?
- Who would benefit from this service?
- What action to take next?





tumblr
as you
analyzes your
with to
analyze

find for
tumblr
to share
on

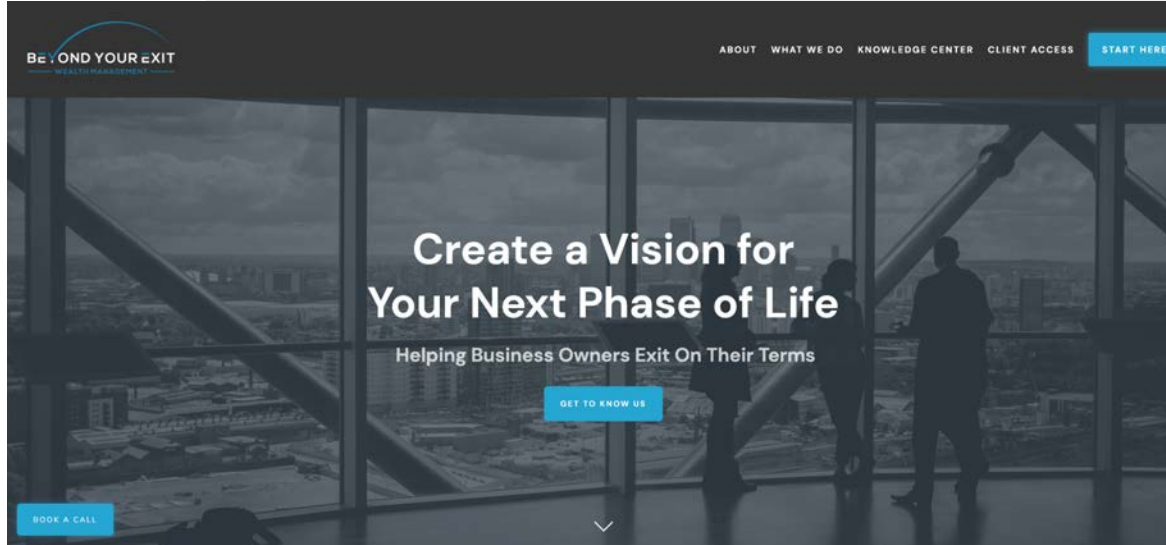
What Does this Look Like On a Website?

Write website copy in the **Problem > Solution Format**

➡ What is the **PROBLEM** your clients/customers & prospects have?

➡ What is the **SOLUTION** you provide to that problem?

OR, Call out **your Key Differentiator**

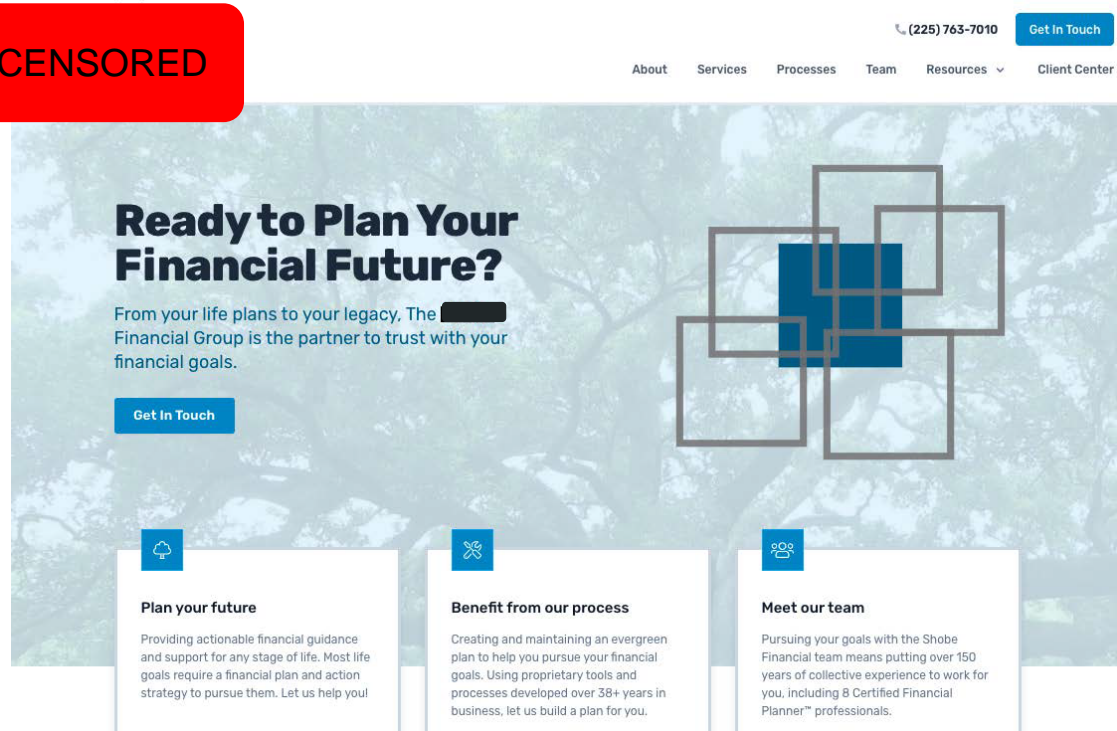


**2nd: Does Your Website
Pass the OTHER
5 Second Test?**

Load time should be under 5.3 seconds

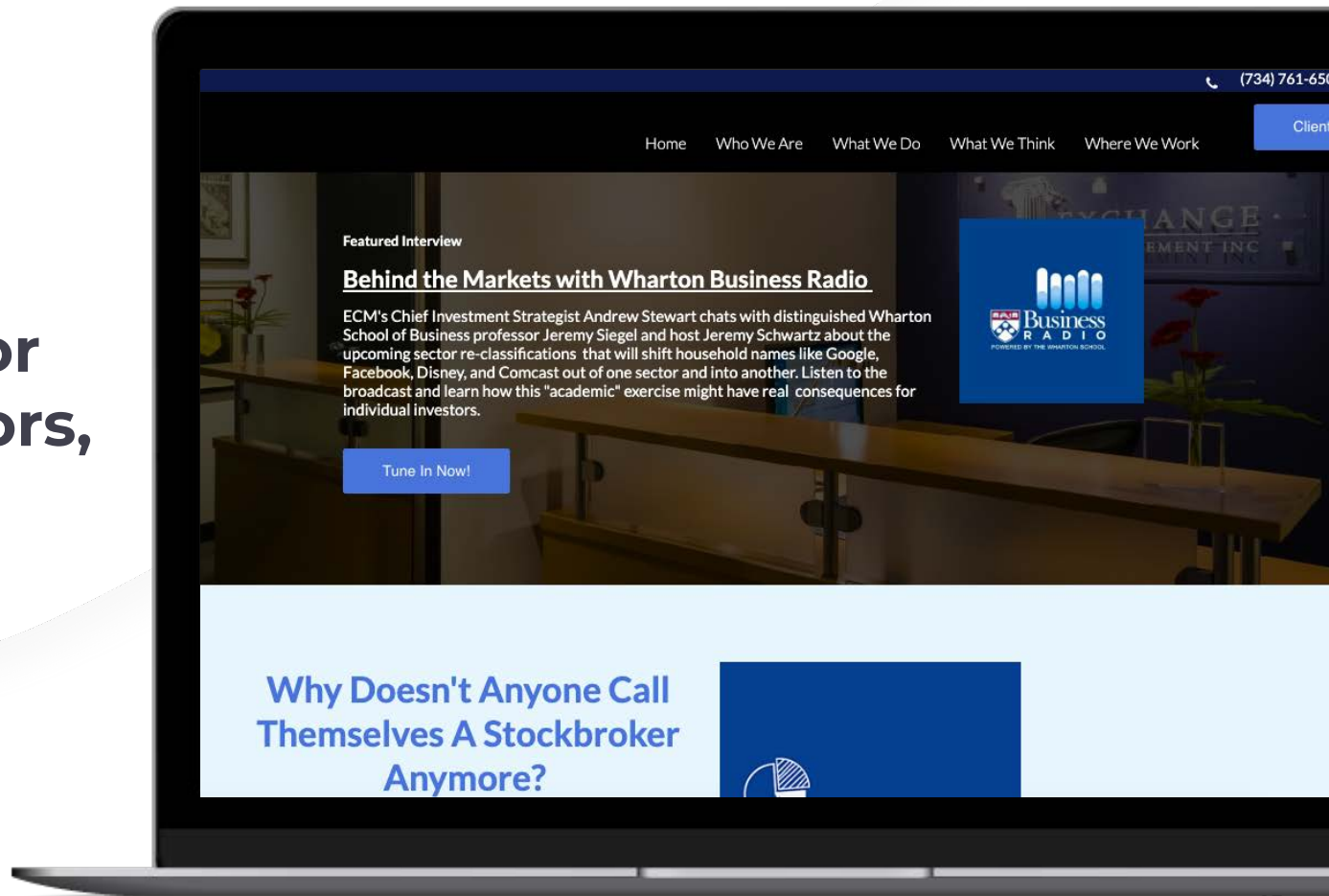
CENSORED

- ➔ Flash content
- ➔ Too many HTTP requests
- ➔ Large file sizes
- ➔ Ineffective caching
- ➔ Server issues

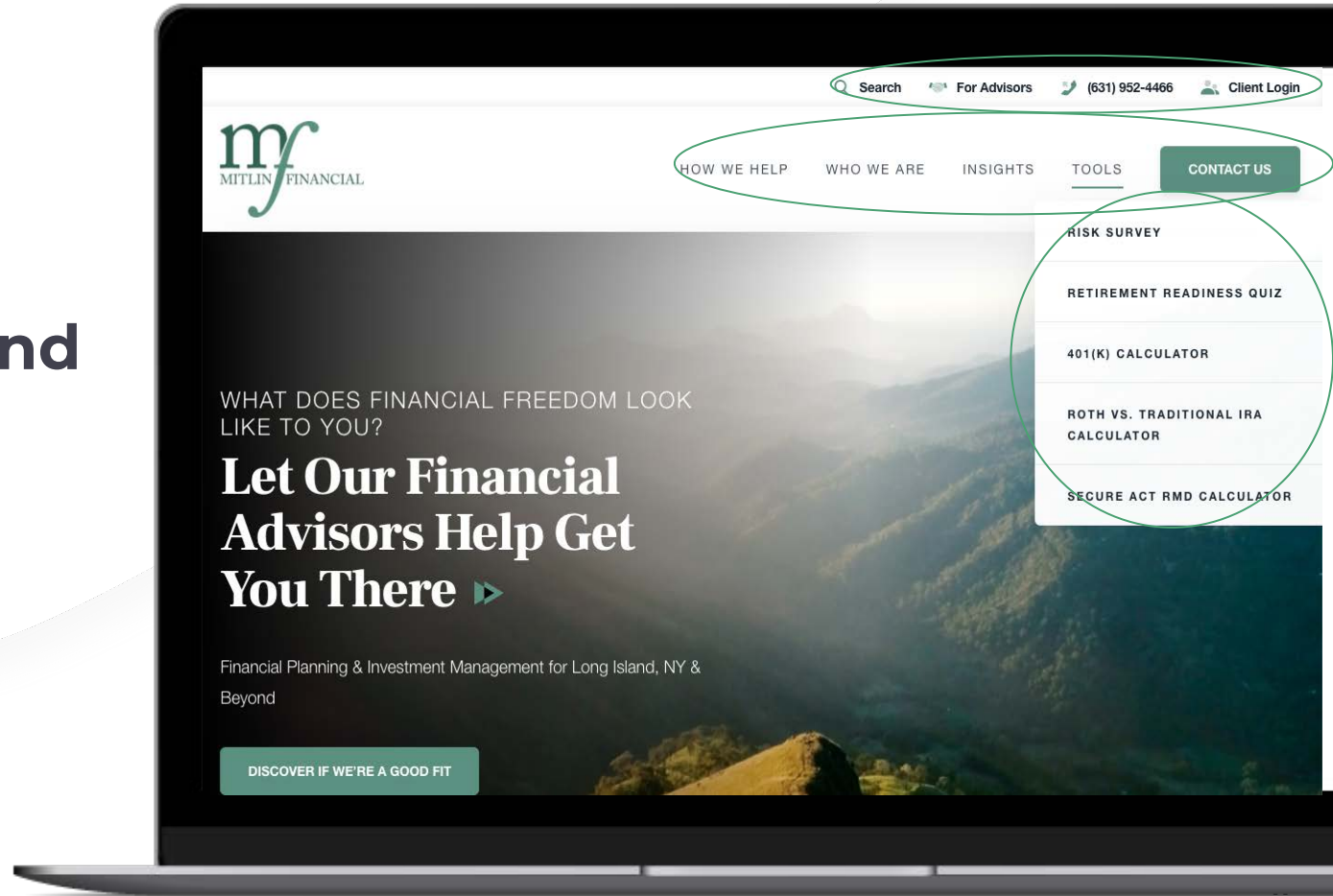


Website Dos: Start Here

Design Your Homepage for 1st time visitors, not repeat visitors



Plan your
content around
what users
want to do
most



Publish new content frequently

Trends to Watch Out for in Q1 2022

By Scott Kubie

We're in a pretty interesting juncture in the markets. As we kick off the third year of the COVID-19 pandemic, the omicron variant is spreading across the country.

[Continue Reading!](#)



The Opportunity in Change: How Changing Goals Change Financial Plans

Posted on January 6, 2022



ESOP Benefits for Business Owners

Posted on January 3, 2022



Expand Your Charitable Reach

Posted on November 22, 2021



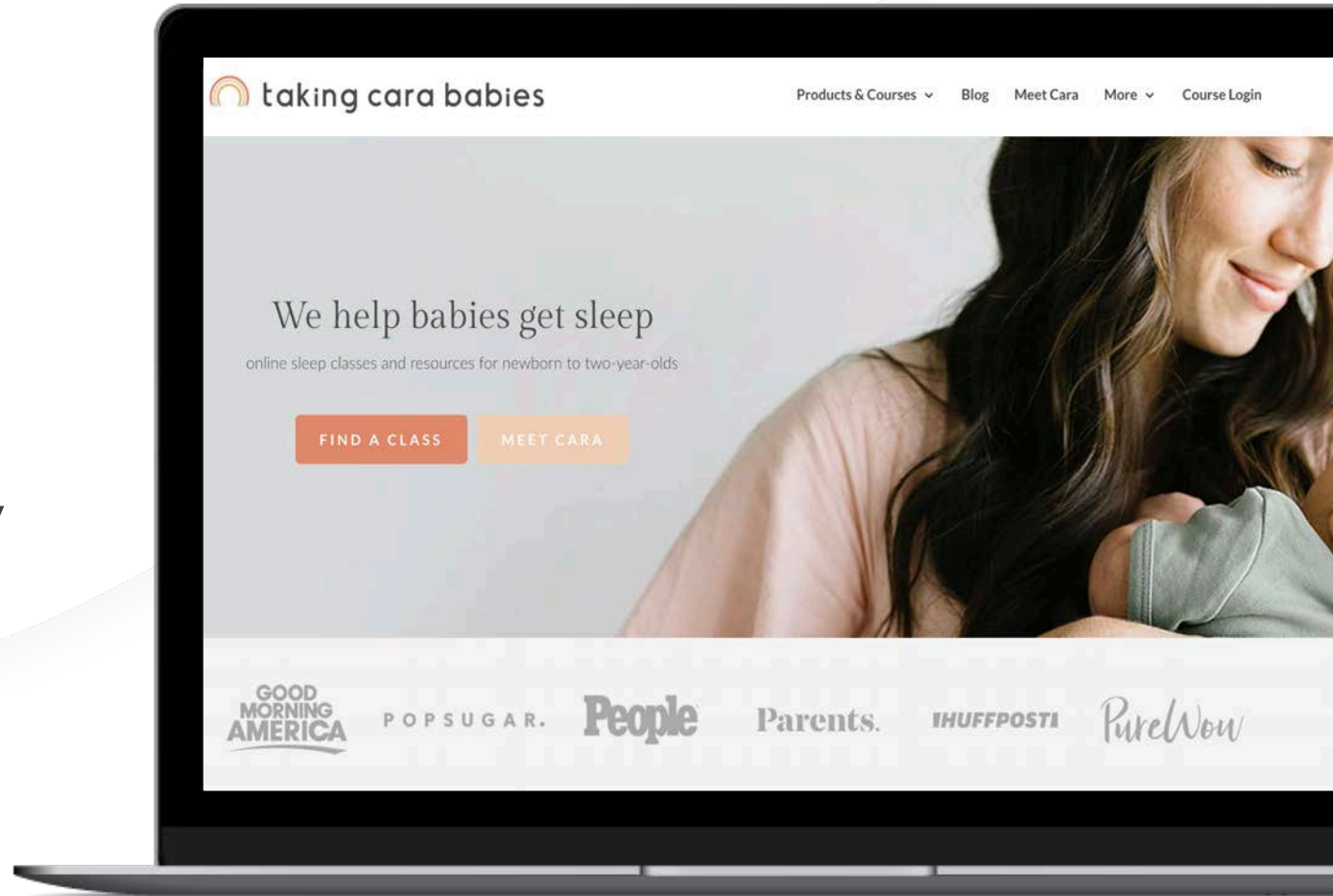
Yes, You Can Make a Solid Long-Term Care Plan. Here's How and Why It's Important



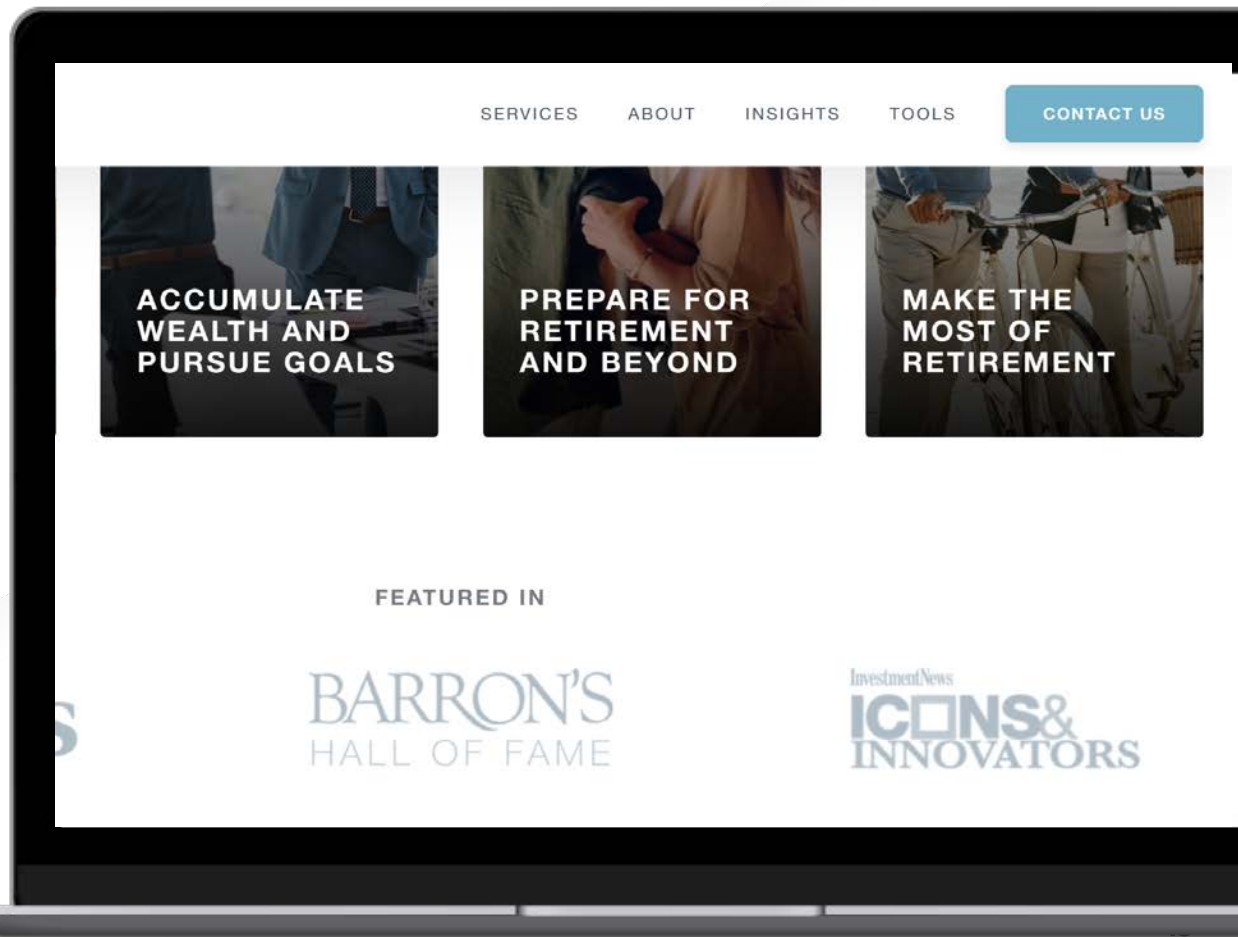
Website Dos: Compel action

Have 2 CTAs:

1. Primary
2. Secondary



Keep your
CTAs always in
sight



For highest %
Conversions,
Make CTAs
specific to
your audience

We've helped hundreds of Eli Lilly* employees reach their retirement goals.

Oaktree Financial Advisors has spent more than 15 years building a comprehensive understanding of Eli Lilly's compensation and benefits programs, offering unparalleled specialization in the needs of their employees.

**Oaktree Financial Advisors Inc. is neither endorsed by nor affiliated with Eli Lilly and Company.*



ELI LILLY NEWSLETTER

Helpful financial information and tips delivered straight to your inbox.

SIGN UP

HOLISTIC ADVISORY SERVICES

We help Eli Lilly employees define and understand their retirement needs. We develop personalized financial plans and investment portfolios that integrate your individual finances and employee benefits, including:

For highest %
Conversions,
Make CTAs
resonate with
your audience

C. L. Sheldon & Company
Management Financial Planning

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Understand Civilian Retirement Plans

Are you a military officer getting ready to retire? Get the gouge on civilian retirement plans. Just click the button below to get your free whitepaper.

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For highest %
Conversions,
Make CTAs
valuable to
your audience



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401(k) Calculator

FOR MANY AMERICANS, MOST OF THEIR NET WORTH IS HELD IN THEIR HOME AND IN RETIREMENT ACCOUNTS - WITH A 401(K) BEING AMONG THE MOST POPULAR. UNDERSTANDING HOW YOUR 401(K) PROJECTS CAN HELP YOU GET A FEEL FOR IF AND WHEN YOU MIGHT BE ABLE TO RETIRE.

Answer these seven questions and we can help you determine how your retirement account compares to what you may need in retirement.

 Search

 (201) 891-1130

 Client Login

[Previous Question](#)

Question 1 of 7

What is your date of birth?

Understanding how your 401(k) could grow begins with knowing how long it has to grow.

MM/DD/YYYY

[Previous Question](#)

[Next Question](#)

Website Dos: Once You've Nailed Those...

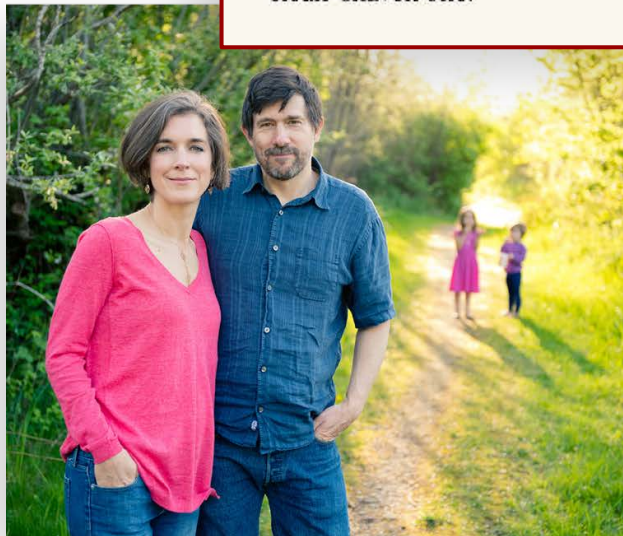


**Show people
who you are.**

Tell Your Story

Write Your Bio in FIRST person. Write like you talk. Don't be so formal

See, that's me, just to the left over there (or up above, if you're on a tiny screen). The clean-shaven one.



About Meg

Meg is our Founder and Lead Planner.

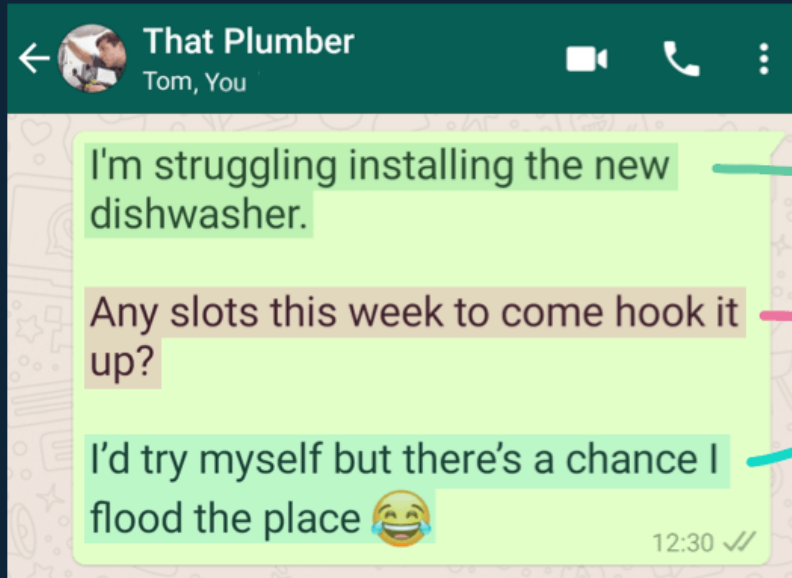
See, that's me, just to the left over there (or up above, if you're on a tiny screen). The clean-shaven one.

Before Flow, I worked for fee-only Registered Investment Advisors in southeastern Virginia. In search of a home better suited to us, we moved to the Bellingham, WA. (I can see Canada from my front porch!) So many of my interests—hiking, biking, cooking, yoga, never-ending kale—are part of the fabric of life here. And for those blessed times when the children go to bed without a fight, I indulge in books about European royal history, sci-fi/fantasy, and Anything Russia.

Prior to becoming a financial planner, I worked as a technical writer for 10 years in the San Francisco Bay Area, mostly in the software-security sector. There I was often the only woman in the engineering group. I even met my husband at one such job. He worked for over 20 years in software until early 2016, when he transitioned to stay-at-home parent so I could launch this firm.

I grew up in coastal Virginia, where the biscuits are delicious but the summers are horrid. I fled north to Wellesley College in Massachusetts, where I majored in Economics, had an ill-fated one-semester experiment with the crew team, and learned how to banish writer's block. Ultimately, I followed the herds to Silicon Valley after graduation in 1998 to get a job in the tech industry.

Use your Customers Words. Speak to their Concerns



 **THAT PLUMBER**

Don't struggle installing that new dishwasher yourself.

I'll come and hook it up in minutes (so there's no chance of you flooding the place).

[Enquire now](#)

Show Some Personality

Even large teams can have fun with their site and be personable

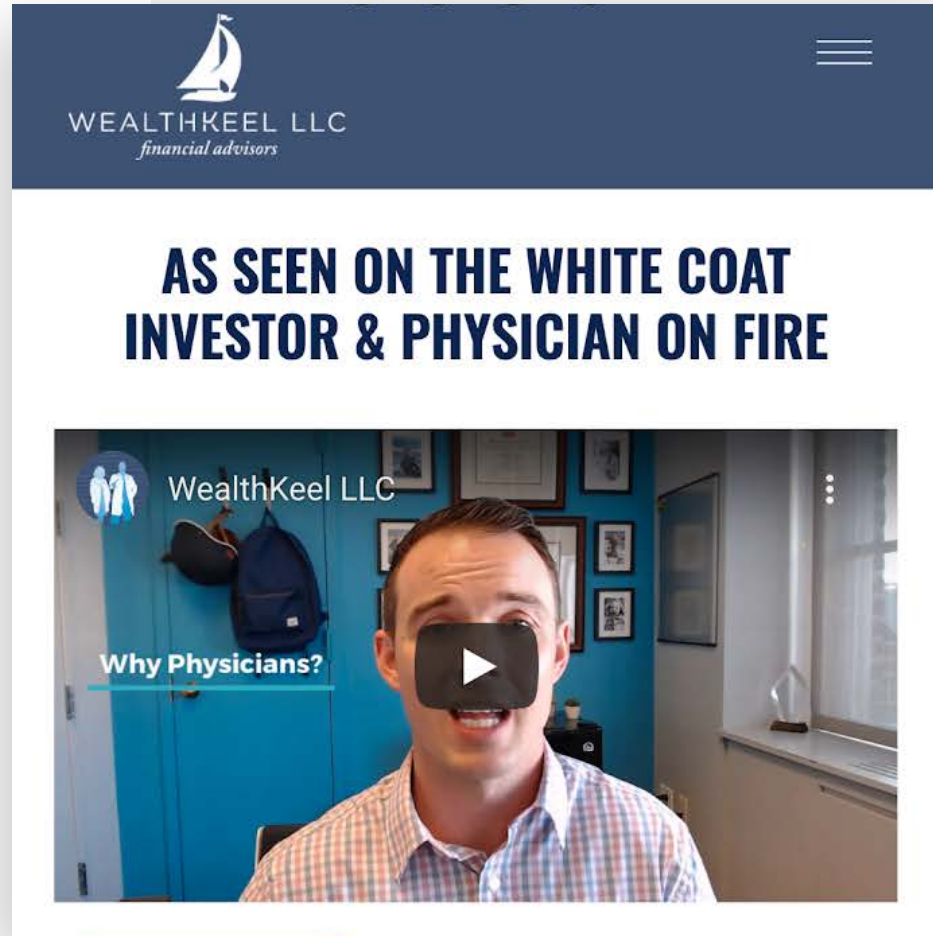


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[CONTACT US](#)

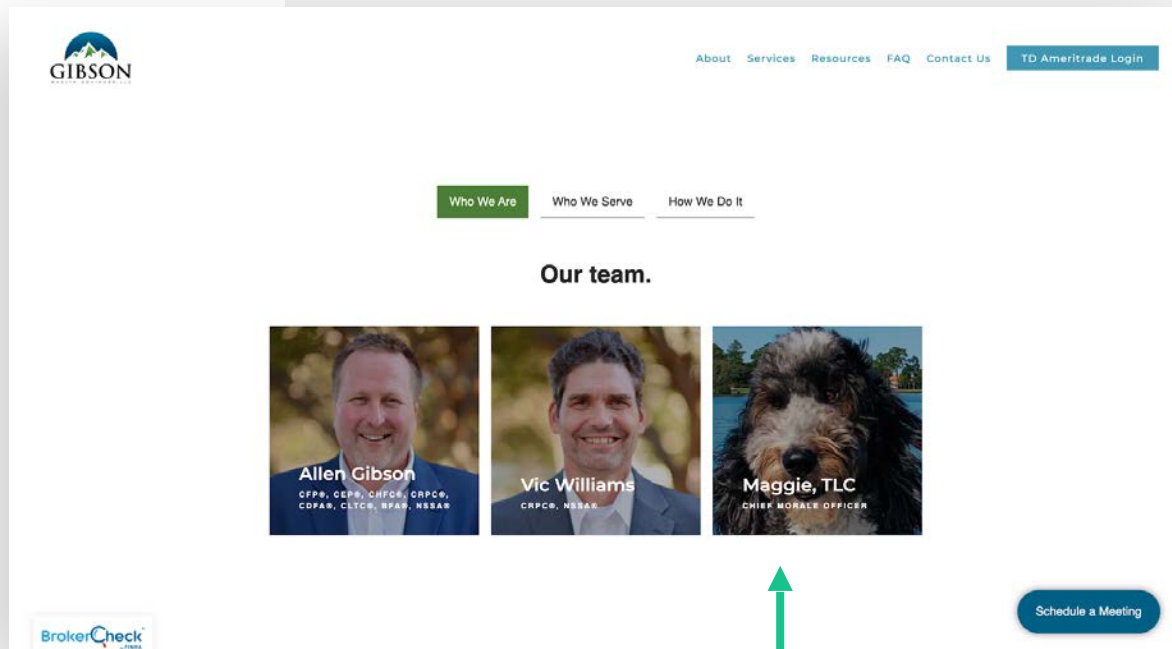


People Connect with People, Not Brands

Include a “Welcome Video” on
Homepage

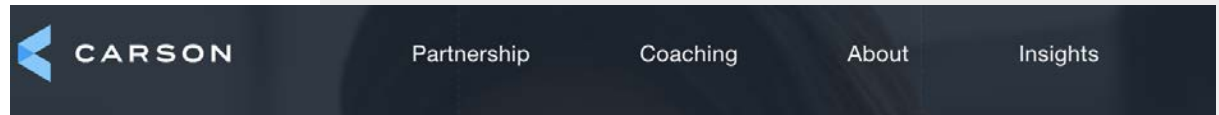
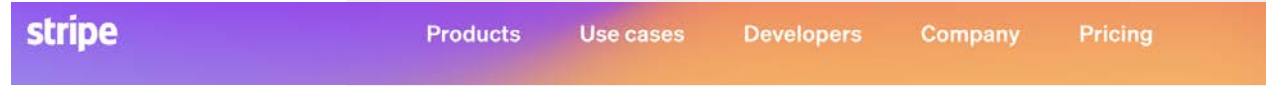


Move “offline” conversation starters online



Website Dont's

Don't Have more
than
5 pages in
the main navigation




Don't Make Your Site Hard to Read.



Make Copy Easy to Scan



 STITCH FIX Women Men Kids

How It Works

Firstly, you've got to fill out your style profile. This involves sharing your fit and style preferences. Then you set the price range that suits your lifestyle—you're in charge. Ok, now it's time to request a delivery. You pay a \$20 styling fee for each shipment, which is credited toward anything you keep. Simples!

Ok, one last thing. We have a try before you buy policy at Stitch Fix. This means you buy what you like, and then anything you don't like can send back no questions asked. Shipping and returns are free and easy. Voila!



 STITCH FIX Women Men Kids

How It Works

01

FILL OUT YOUR STYLE PROFILE

Share your fit and style preferences and set the price range that suits your lifestyle—you're in charge.

02

REQUEST A FIX® DELIVERY

You pay a \$20 styling fee for each shipment, which is credited toward anything you keep.

03

TRY BEFORE YOU BUY

Buy what you like, send back the rest. Shipping and returns are free and easy.

Don't ignore SEO basics!

Know your keywords

- Static content
- Frequently updated content

Hit the big 4:

- Page title
- Metadescription
- H1
- Alt text

financial advisor

United States English Google Jan - Dec 2021

Broaden your search: + advisor + registered representative + corporate business website + investment professional + financial planning + finance + financial management

REFINE KEYWORDS

Exclude adult ideas ADD FILTER 883 keyword ideas available

Keyword view

Keyword (by relevance)	Avg. monthly searches	Three month change	YoY change	Competition	Ad impression share	Top of page bid (low range)	Top of page bid (high range)	Account status
Keywords you provided								
financial advisor	100K - 1M	0%	0%	Medium	-	\$12.60	\$46.62	
Keyword ideas								
financial planner	10K - 100K	0%	0%	Medium	-	\$8.69	\$31.39	
certified financial planner	10K - 100K	0%	0%	Medium	-	\$6.11	\$21.05	
financial advisors near me	10K - 100K	0%	0%	Medium	-	\$10.63	\$66.46	
financial consultant	1K - 10K	0%	-90%	Low				
financial consultant near me	1K - 10K	0%	-99%	Low				
independent financial advisor	1K - 10K	0%	0%	Medium				
fiduciary financial advisor	1K - 10K	0%	0%	High				

Keyword Magic Tool: financial advisor

Database: United States Currency: USD

All Questions Broad Match Phrase Match Exact Match Related Languages

Volume KD % Intent CPC (USD) Include keywords Exclude keywords

By number By volume

All keywords: 66,148 Total volume: 950,7K Average KD: 38%

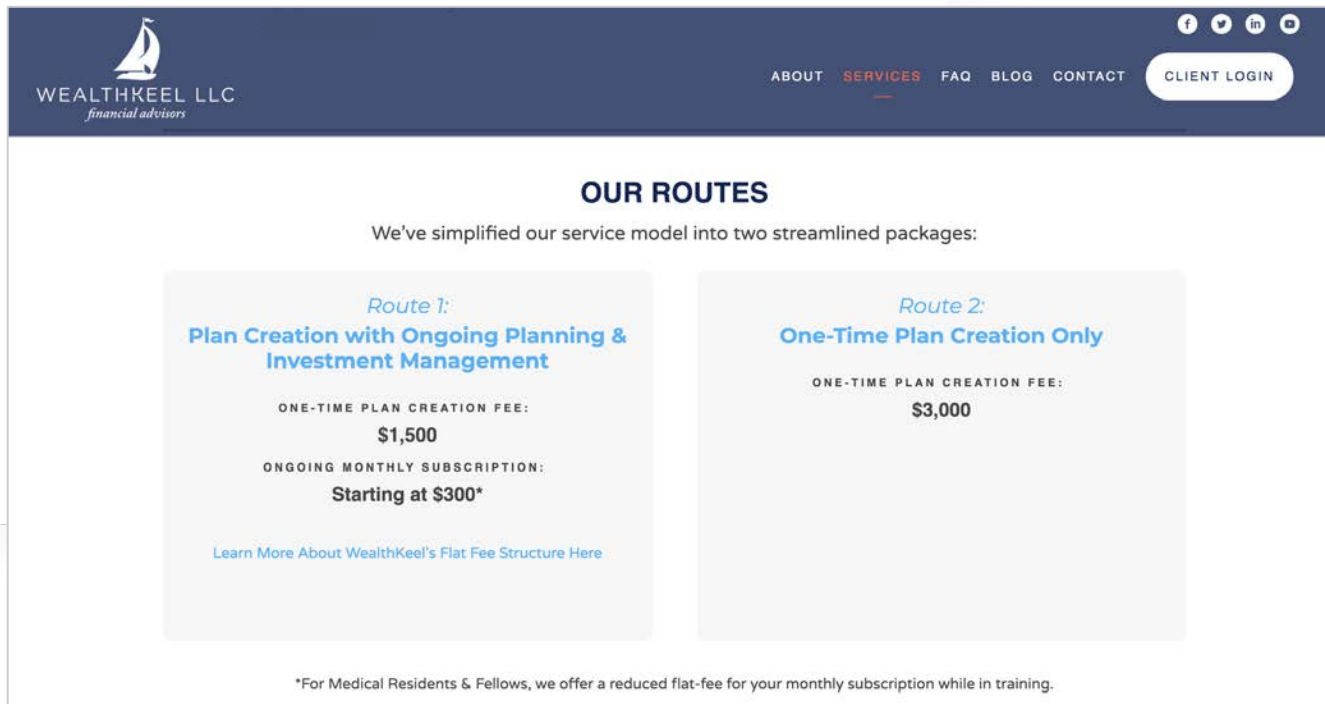
Keyword	Volume	Intent	CPC (USD)
jones	2,383		
edward	2,353		
salary	2,341		
best	1,984		
jobs	1,801		
fee	1,278		
top	1,261		

All keywords: 66,148 Total volume: 950,7K Average KD: 38%

Keyword	Volume	Intent	CPC (USD)
financial advisor	135,000		
financial advisors	135,000		
edward jones financial advisor	33,100		
financial advisor near me	33,100		
financial advisor salary	22,200		



Don't hide your fees



The screenshot shows the top of the WealthKeel LLC website. The header is dark blue with the company logo on the left, navigation links in the center, and social media icons and a client login button on the right. The main content area is white and features a section titled 'OUR ROUTES' with a sub-header 'We've simplified our service model into two streamlined packages:'. Below this are two light gray boxes representing different service packages. The first box, 'Route 1: Plan Creation with Ongoing Planning & Investment Management', lists a one-time fee of \$1,500 and a monthly subscription starting at \$300*. The second box, 'Route 2: One-Time Plan Creation Only', lists a one-time fee of \$3,000. A link to learn more about the flat fee structure is provided at the bottom of the first box. A footnote at the bottom of the page explains the reduced fee for medical residents and fellows.

WEALTHKEEL LLC
financial advisors

ABOUT SERVICES FAQ BLOG CONTACT CLIENT LOGIN

OUR ROUTES

We've simplified our service model into two streamlined packages:

Route 1:
Plan Creation with Ongoing Planning & Investment Management

ONE-TIME PLAN CREATION FEE:
\$1,500

ONGOING MONTHLY SUBSCRIPTION:
Starting at \$300*

[Learn More About WealthKeel's Flat Fee Structure Here](#)

Route 2:
One-Time Plan Creation Only

ONE-TIME PLAN CREATION FEE:
\$3,000

*For Medical Residents & Fellows, we offer a reduced flat-fee for your monthly subscription while in training.

One-Time Financial Plan

Financial plan development + DIY plan implementation

PRICING
\$2,000 - \$4,000

(BASED ON COMPLEXITY)

BEST FOR:

- DIY clients that just want a financial roadmap or professional validation of their current strategy

Financial Wellness Program

Financial plan development + implementation support

PRICING
PLAN DEVELOPMENT FEE + SUBSCRIPTION*

*STARTS AT \$2,400/YEAR

BEST FOR:

- 'Hands on' with managing your finances but want ongoing access to professional advice
- Majority of net worth tied up in home equity, 401k, and equity compensation

Investment Management

Financial plan development + implementation support + portfolio management

PRICING
Plan Development Fee
+ % AUM**

**STARTS AT 1.00% X ASSETS UNDER MANAGEMENT

BEST FOR:

- Limited or no experience managing investments
- Large equity or windfall event (i.e. IPO, Acquisition)
- Highly concentrated current portfolio

MYRA
WEALTH

Home About Services Pricing Blog Podcast GET STARTED

FINANCIAL PLANNING

Flat Fee of **\$500/month**
Annual Contract, Paid Upfront

INVESTMENT
MANAGEMENT

As low as **0.30%** of Assets
Annual Contract, Paid Upfront

FAMILY OFFICE
SERVICES

Starting at **\$542/month**
Annual Contract, Paid Upfront

Not sure which plan
is right for you?

Give us a call. We'll help you choose the perfect plan to suit
your needs.

+1 (805) 380-MYRA

FINANCIAL PLANNING

TALK TO SALES

For everyone who wants to better manage their personal finances. Financial Planning services are charged as a fixed fee, at **\$500/month**, or **\$6,000/year**. Note: Our Financial Planning service is offered at no additional cost to our Family Office clients.

Broadly, financial planning will address several areas, including (but not limited to) the following:

- ✓ **Basic Planning:** including identifying financial goals, evaluating financial statements, cash flow management, financial counselling, and debt management.
- ✓ **Education Planning:** including education needs analysis, education savings vehicles, financial aid, gift/income tax strategies, and education financing.
- ✓ **Insurance Planning:** including evaluation of risk exposures, health insurance and health care, disability insurance, long-term care insurance, annuities, life insurance, property and casualty insurance, and insurance needs analysis.
- ✓ **Investment Planning:** including planning for investment taxes. Services out of scope here, but covered in investment management, include incorporating investment risk, assessing investment returns, determining asset allocation, portfolio development & diversification, bond and stock selection, and alternative investment assessment.
- ✓ **Tax Planning:** including factoring income taxes, taxation of business entities, taxation of trusts and estates, alternative minimum tax (AMT), tax reduction techniques, tax consequences of property transactions, passive activity and at-risk rules, and charitable/philanthropic contributions.
- ✓ **Retirement Planning:** including retirement needs analysis, social security, medicare, medicaid, qualified plan rules & options, tax-advantaged retirement plans, plan selection for businesses, distribution rules and taxation, retirement income distribution, and business succession planning.
- ✓ **Estate Planning:** consequences of property titling, strategies to transfer property, estate planning documents, gift and estate tax, sources for estate liquidity, taxation of trusts, marital deductions, intra-family & business transfer techniques, and estate planning techniques.
- ✓ **Other Planning:** Buy vs. Lease a Car decision, Buy vs. Rent a Home decision, Credit card selection, Understanding Diamonds, Career Planning, Job Offer negotiation, Employee benefits selection, Saving for Travel, and Merging Finances.

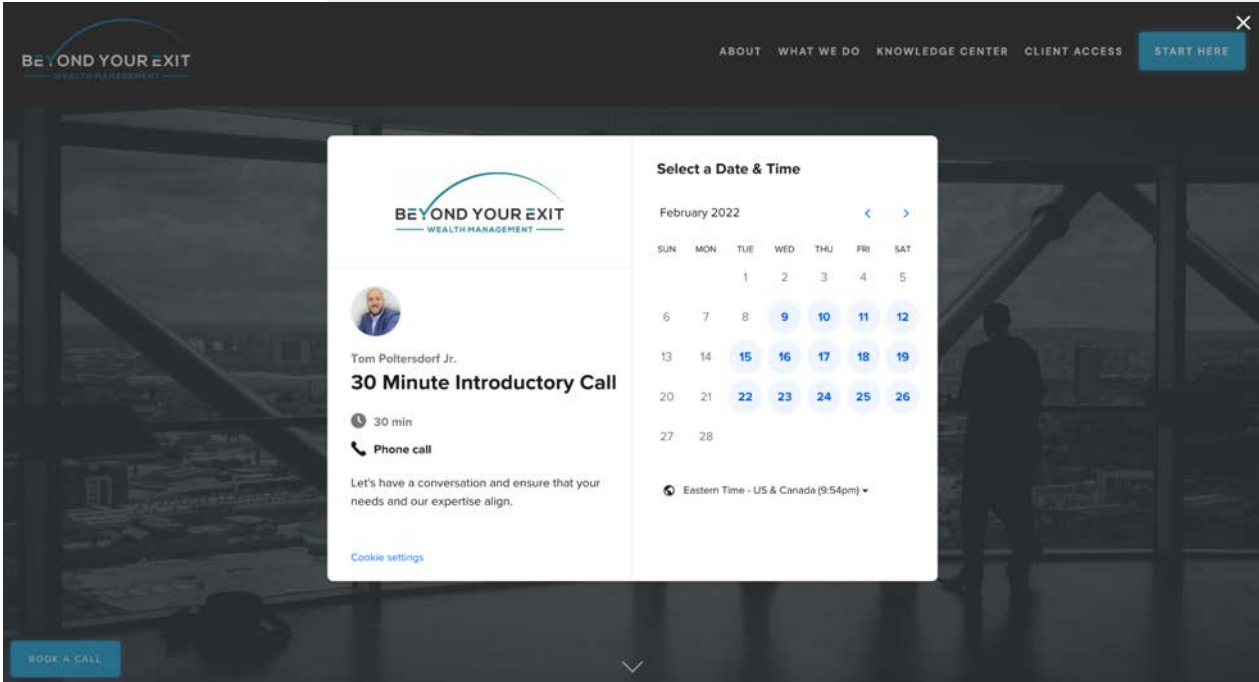
If you're a current student (or recent graduate), check out [MYRA Wealth for Students](#)

fmg suite

CARSON

33

Don't forget to
include a direct link
to your calendar



Don't Be Afraid to Toot Your Own Horn.



Investopedia Top 100 Financial Advisor 2019

Investopedia

Expertise Best Financial Advisors in St. Paul 2019

WHAT WE DO WORKING WITH US MEET THE TEAM BLOG CONTACT US

FREE ASSESSMENT



As Featured In

THE WALL STREET JOURNAL.  **CNBC**  **CBSNEWS**



Above all...

**Don't be
boring.**

Questions?

Email: marketing@fmgsuite.com

Samantha Russell

Chief Evangelist

 @SamanthaTwenty

 /samanthacrussell

 fmgsuite.com

