WEBSITE DESIGN BEST PRACTICES FOR MORE CONVERSIONS IN 2022

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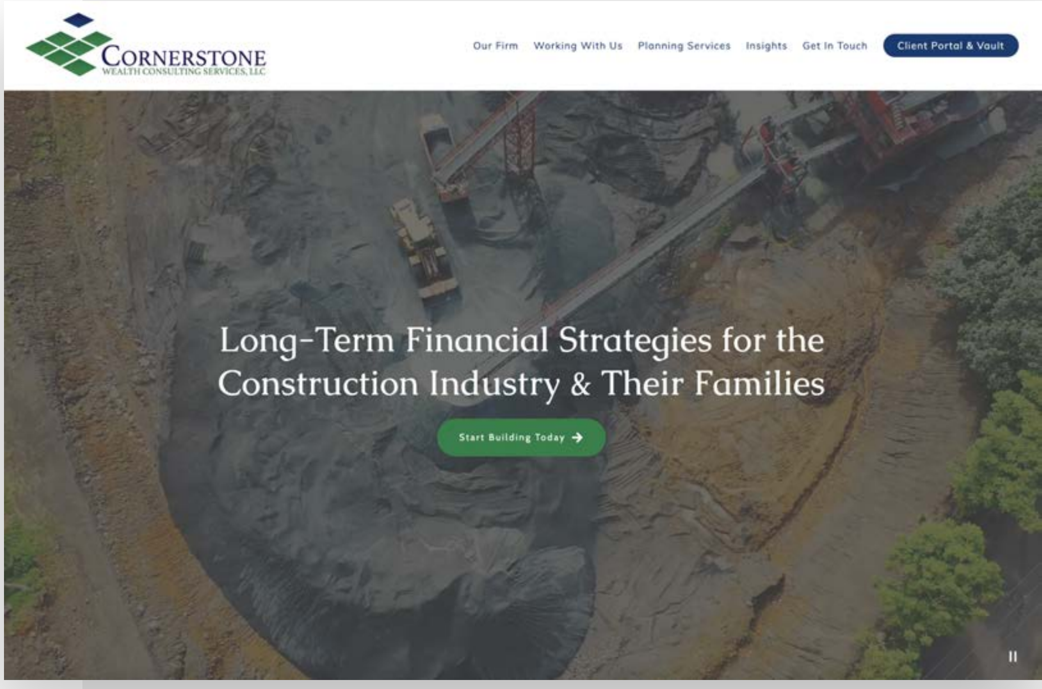
1st: Does Your Website Pass the 5 Second Test?

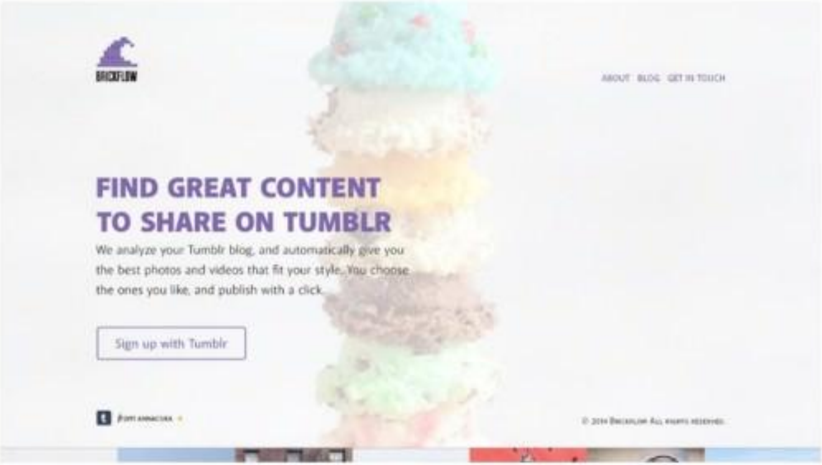
The 5 Second Test

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?

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to
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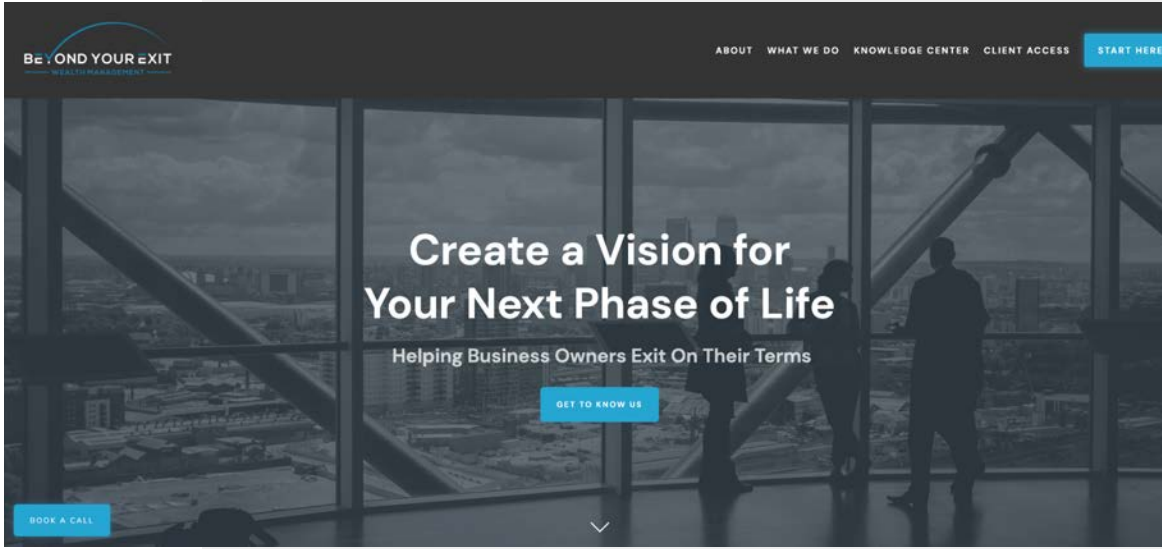
What Does this Look Like On a Website?

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?

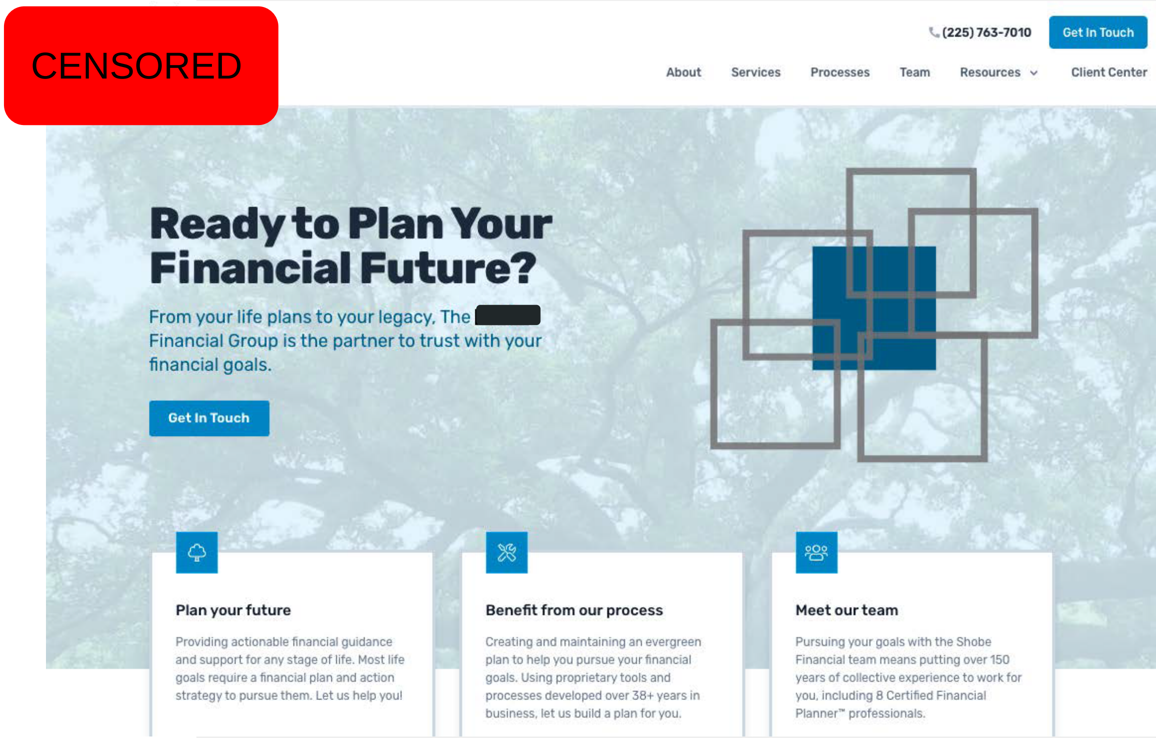
OR, Call out **your Key Differentiator**



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

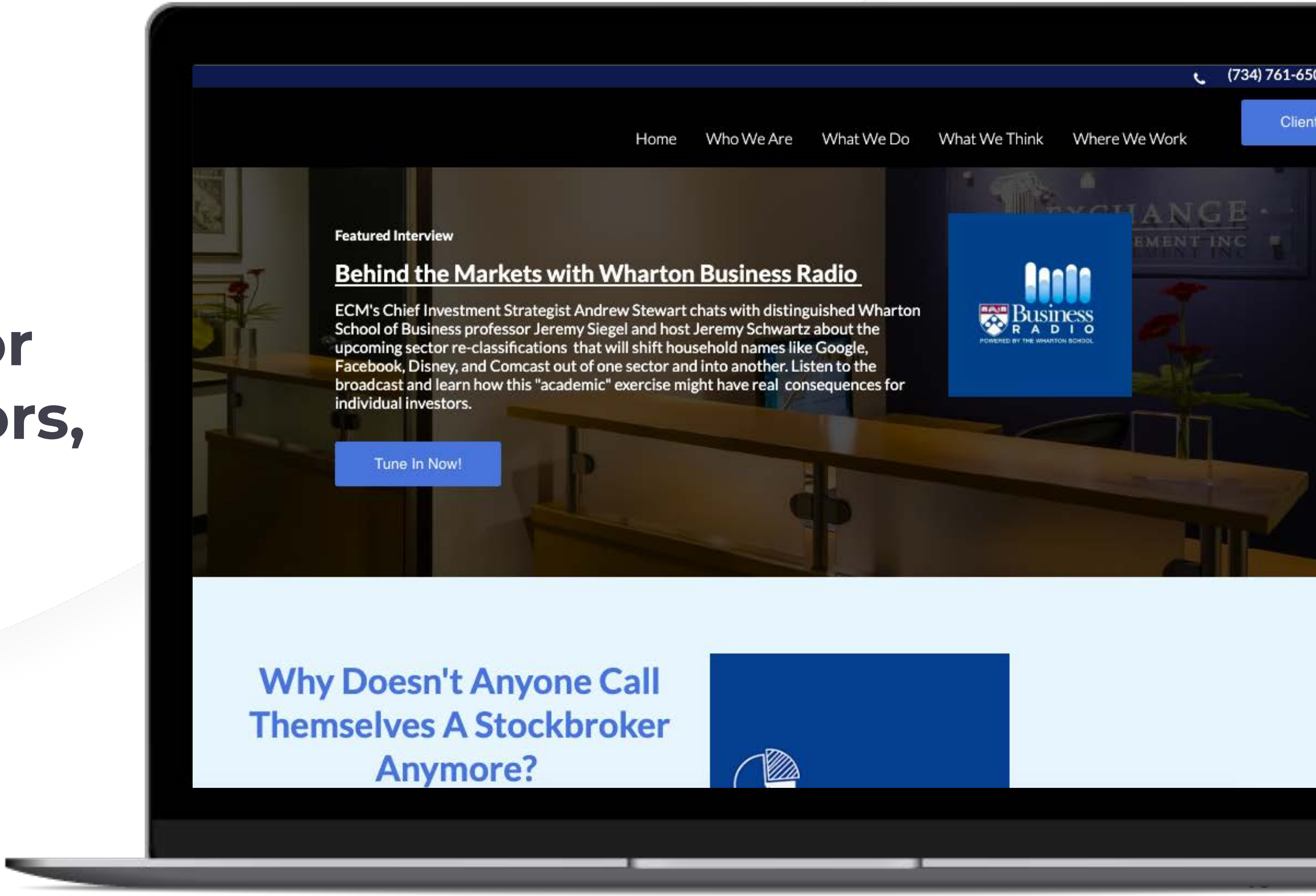
Load time should be under 5.3 seconds

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

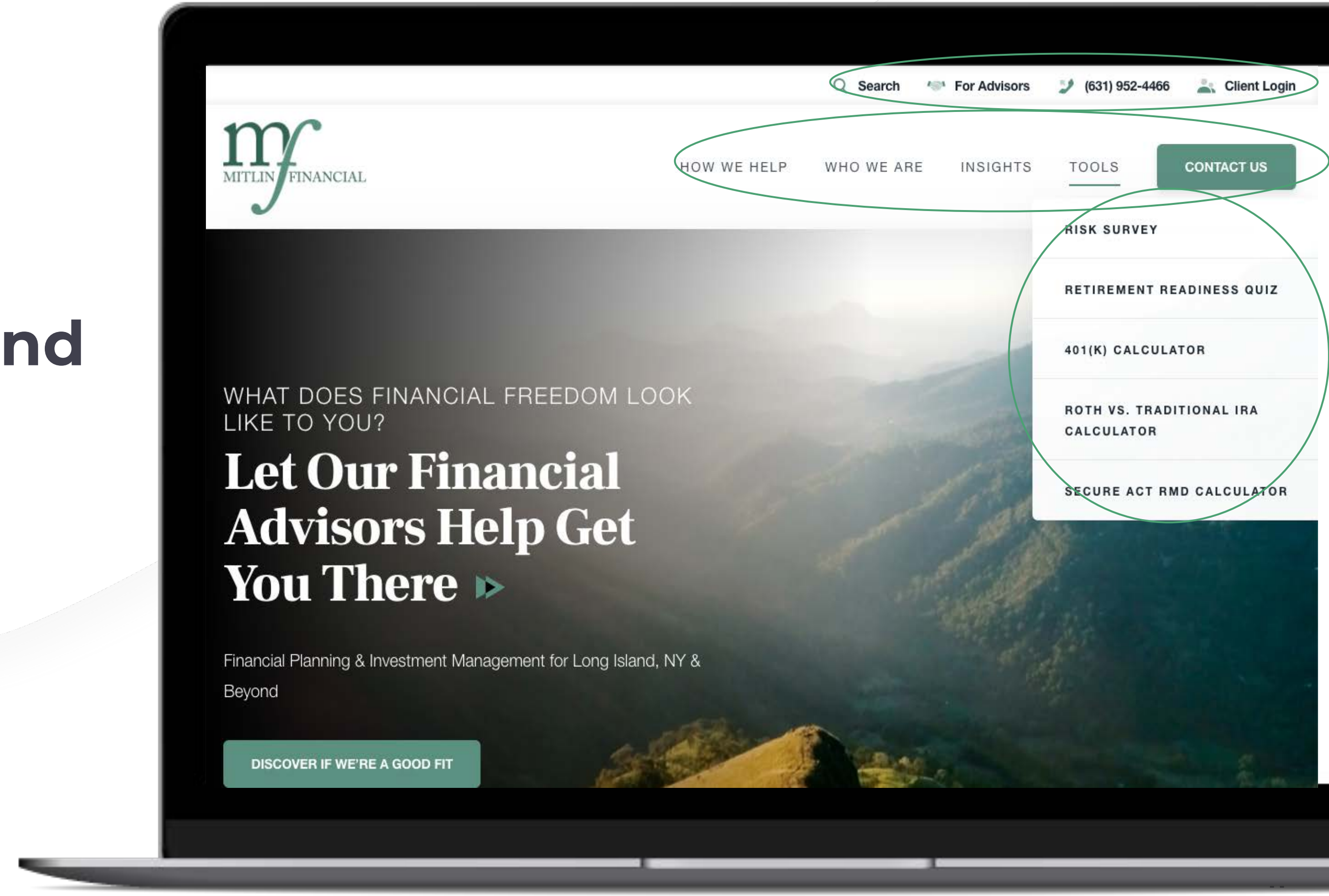


Website Dos:
Start Here

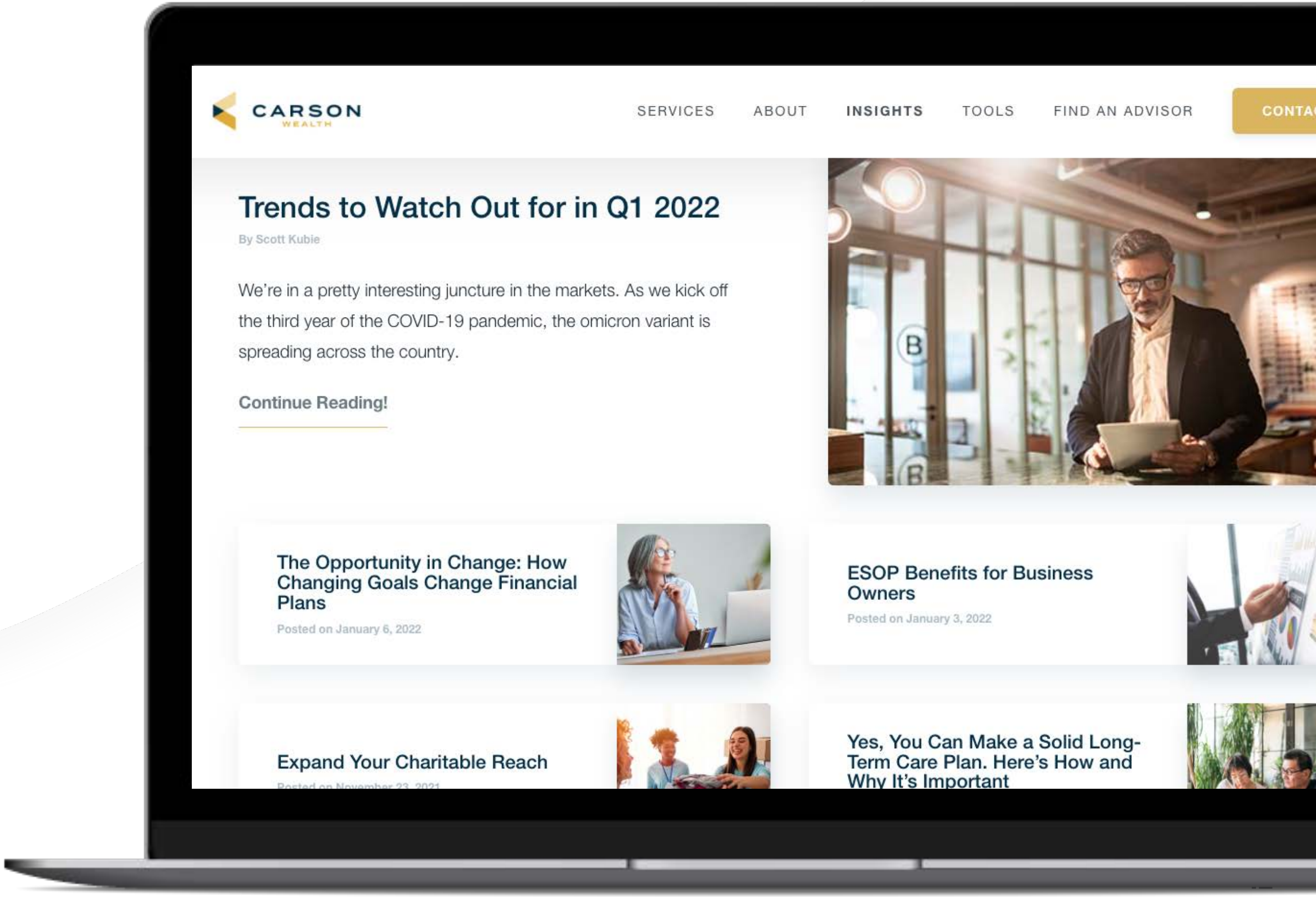
Design Your Homepage for 1st time visitors, not repeat visitors



Plan your content around what users want to do most



Publish new content frequently



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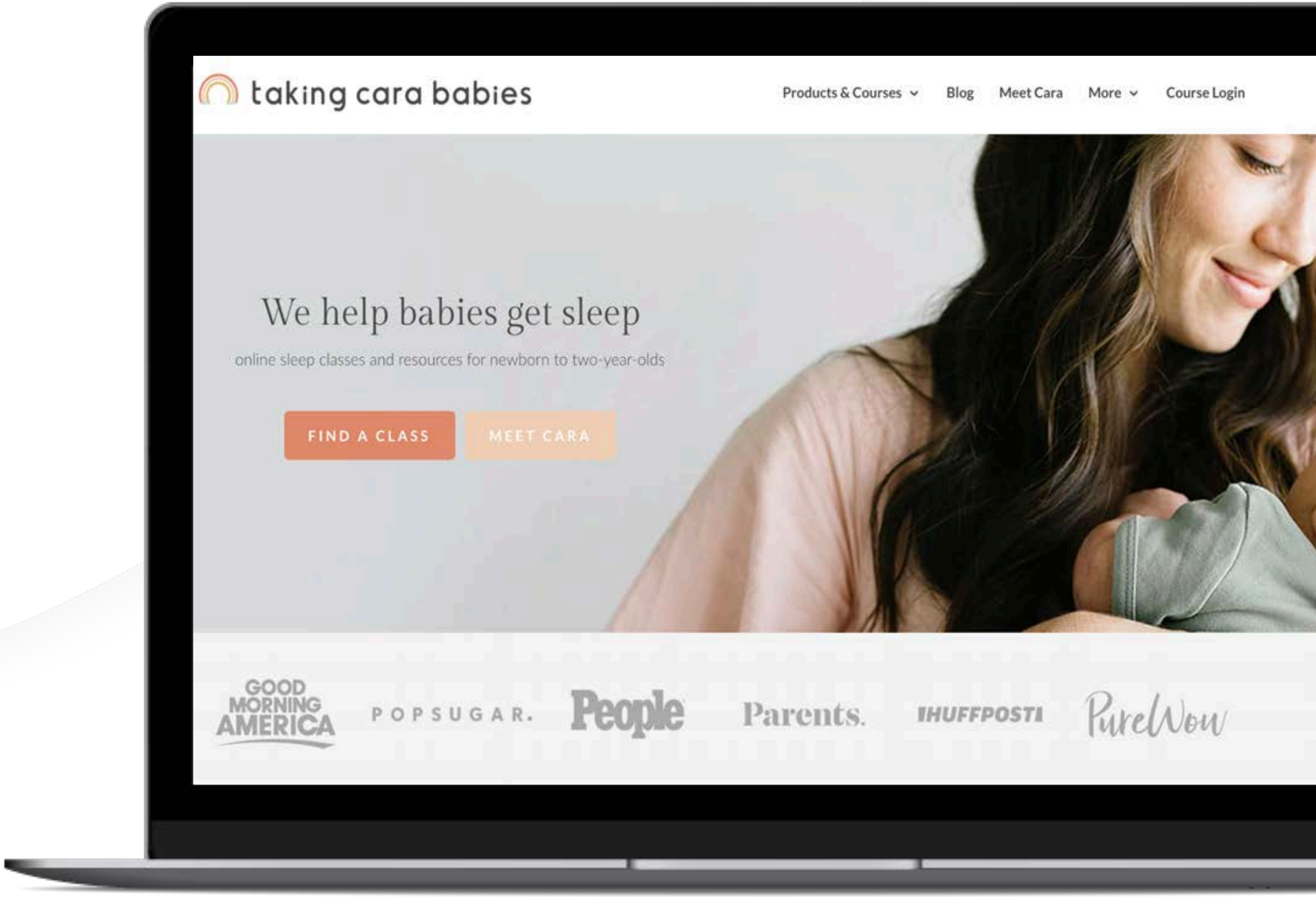
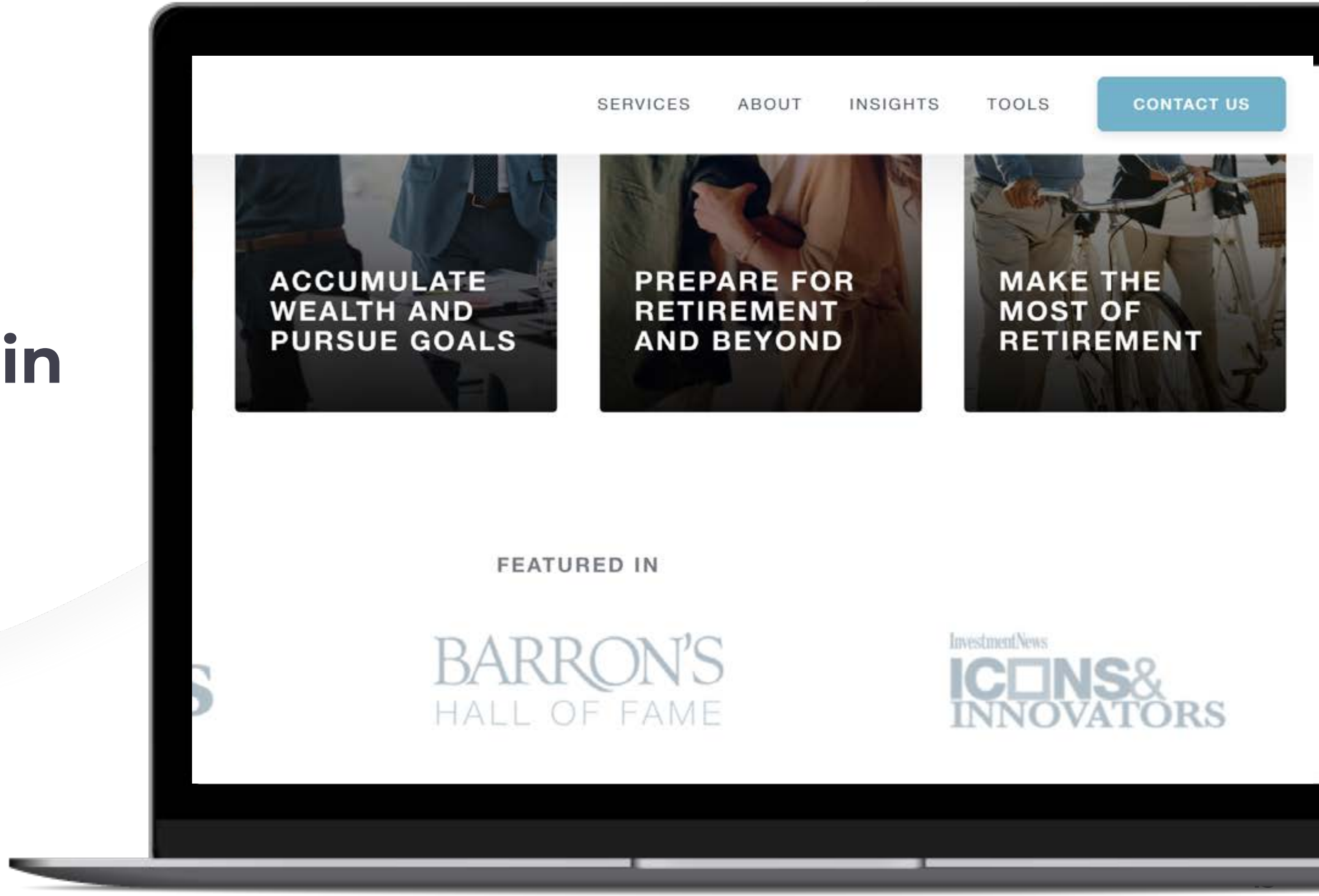
Website Dos: Compel action

Have 2 CTAs:

1. Primary
2. Secondary



Keep your CTAs <u>always</u> in sight



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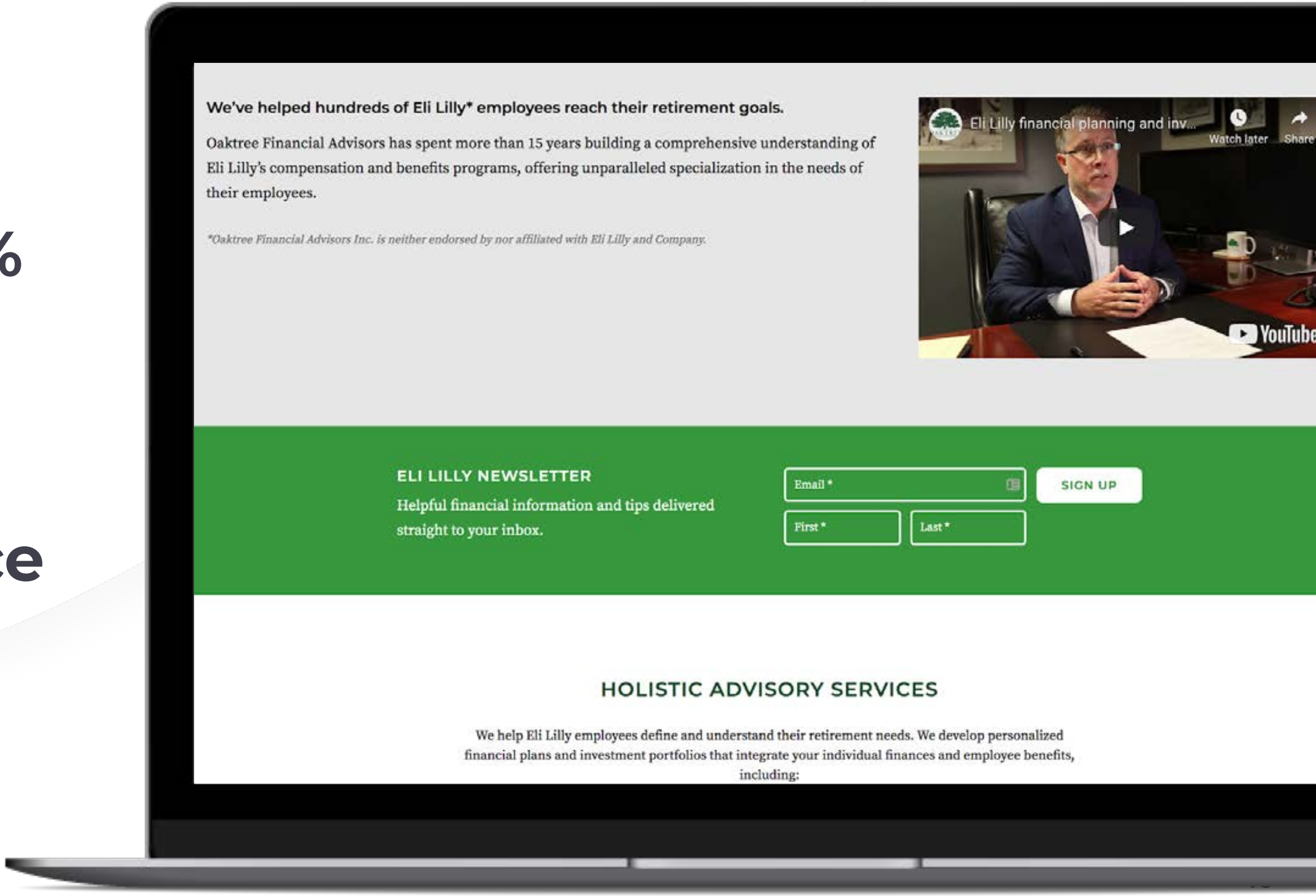
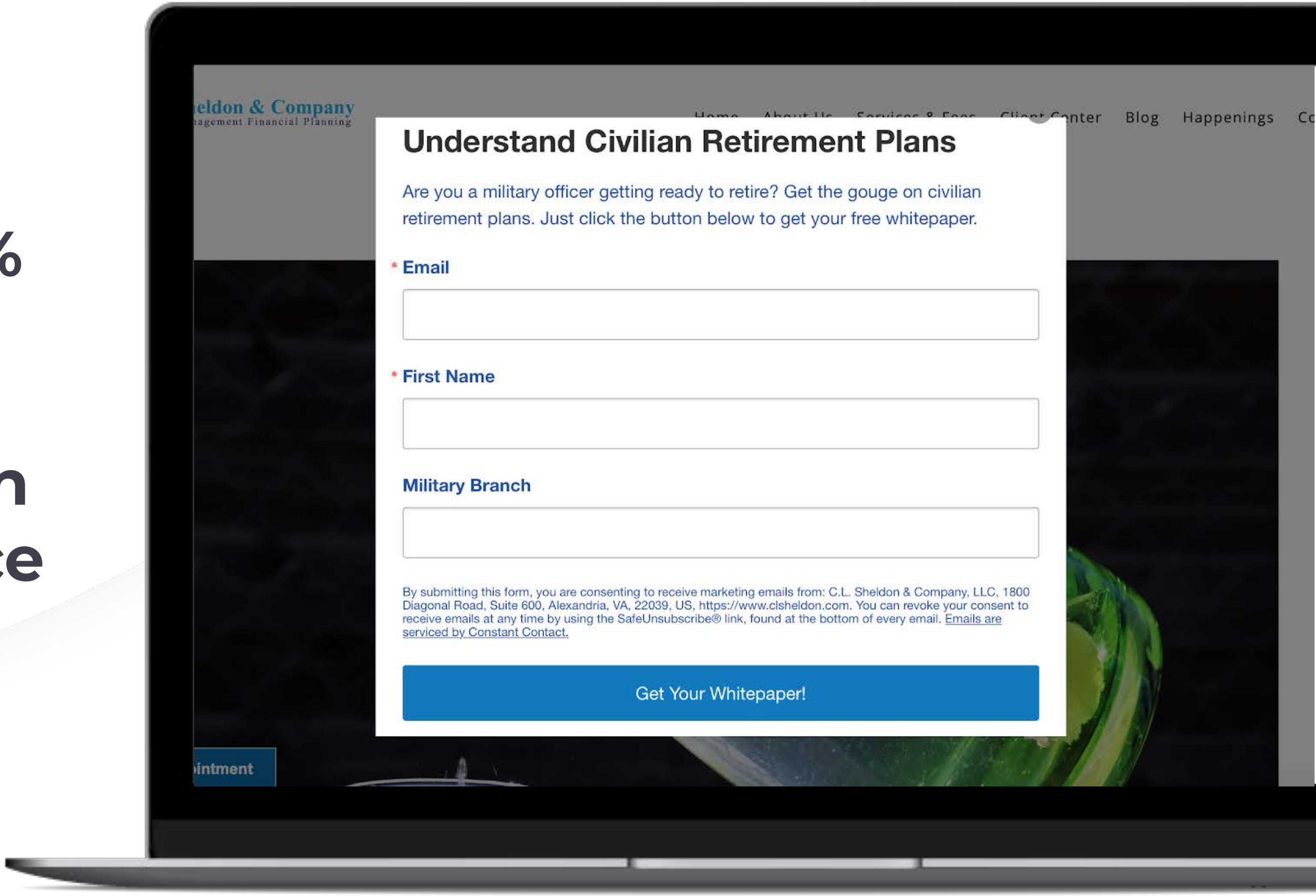
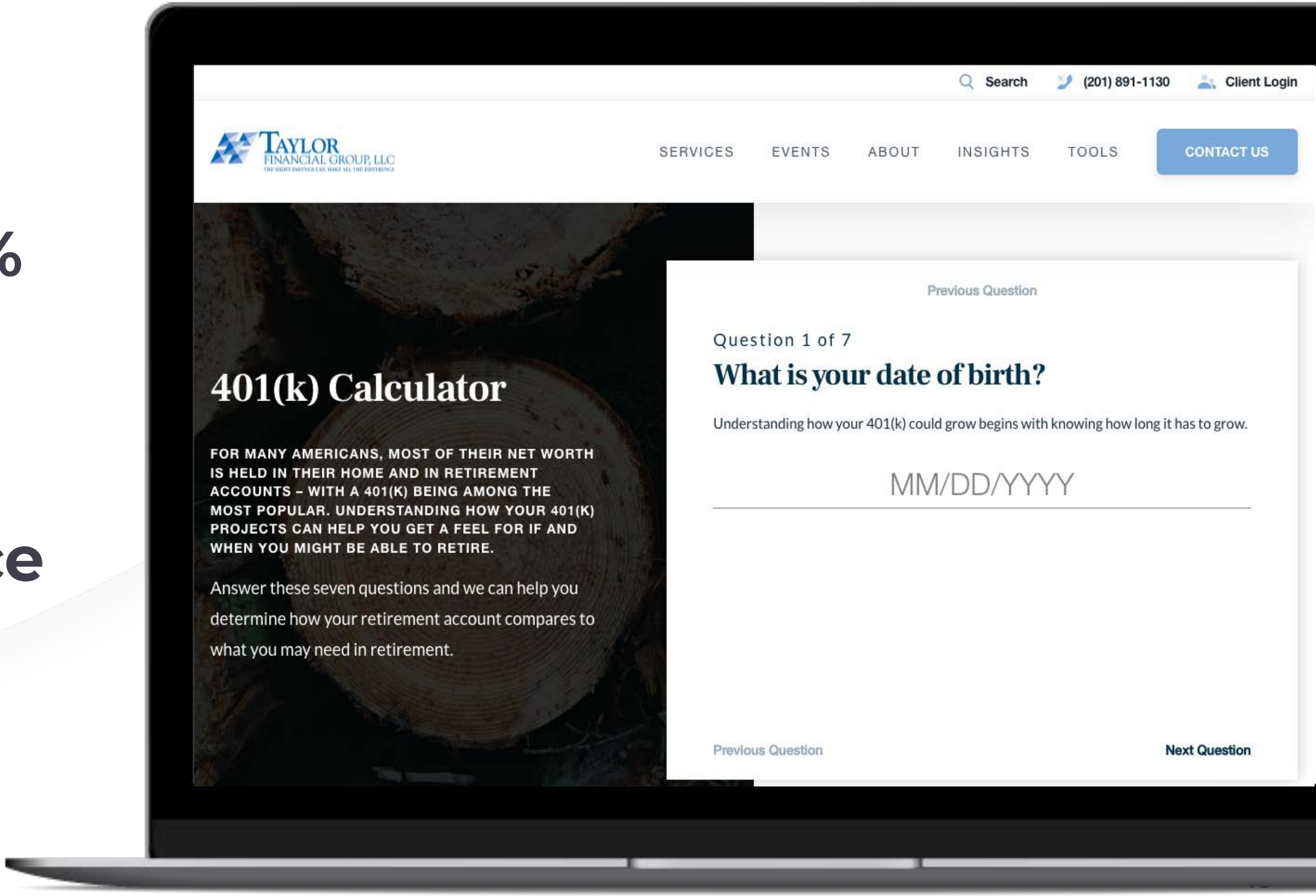
For highest % Conversions, Make CTAs specific to your audience



For highest % Conversions, Make CTAs resonate with your audience



For highest % Conversions, Make CTAs valuable to your audience



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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.

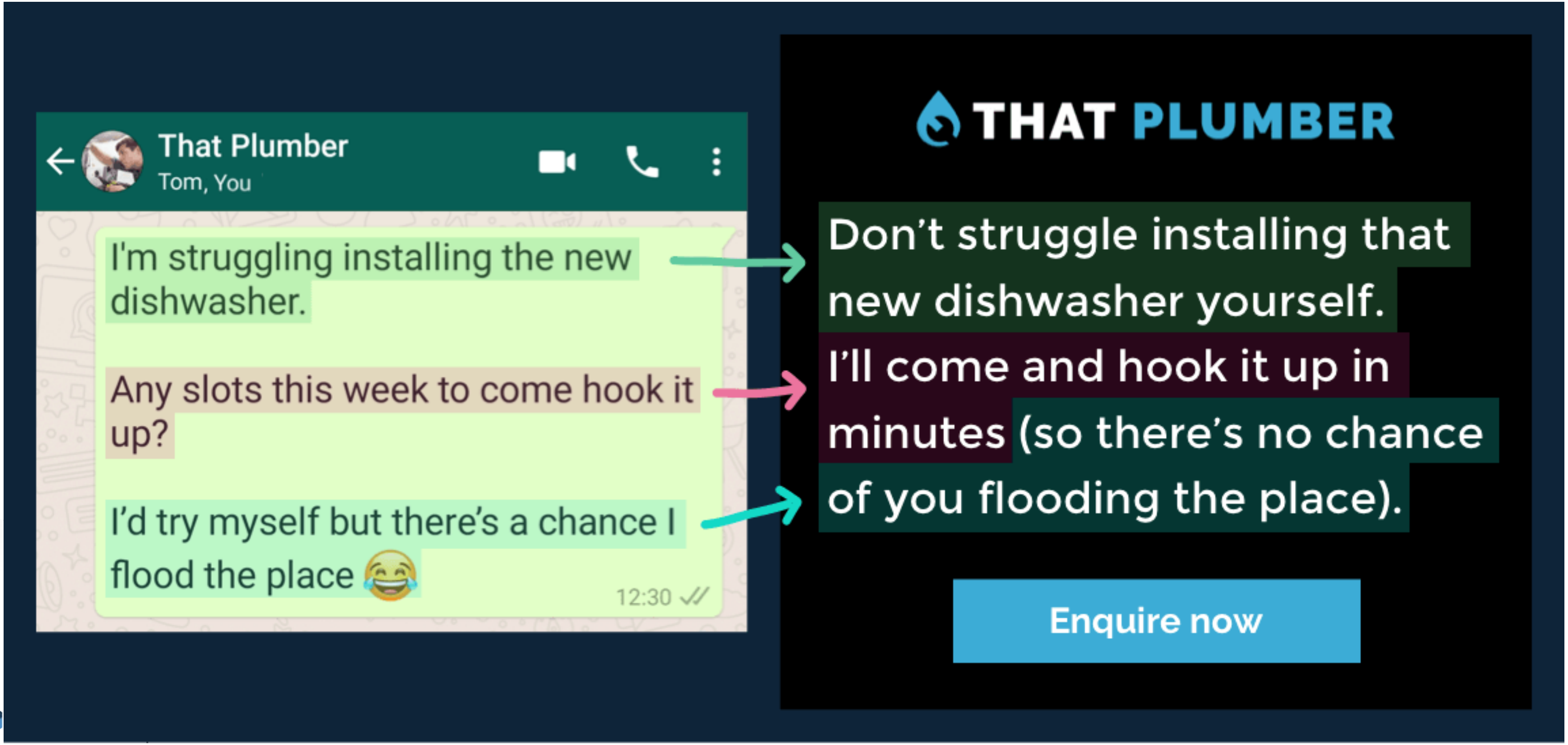
See, that's me, just to the left over there (or up above, if you're on a tiny screen). The clean-shaven one.

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.

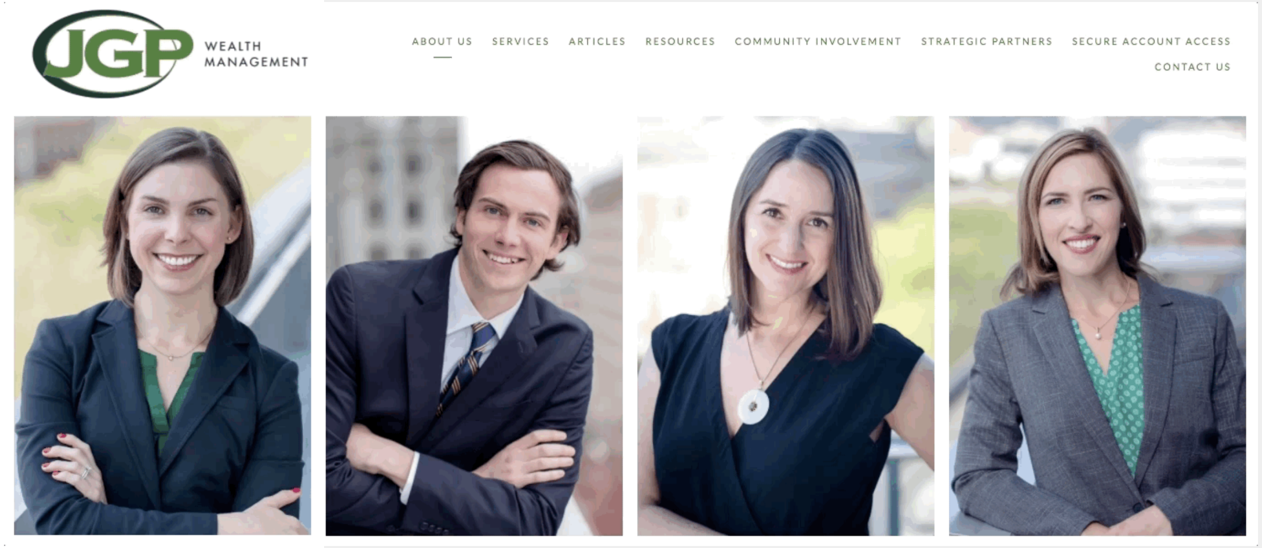
I grew up in coastal Virginia, where the biscuits are delicious but the summers are horrid. I fled north to Wellesley College in Massachusetts, where I majored in Economics, had an ill-fated one-semester experiment with the crew team, and learned how to banish writer's block. Ultimately, I followed the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

Use your Customers Words. Speak to their Concerns



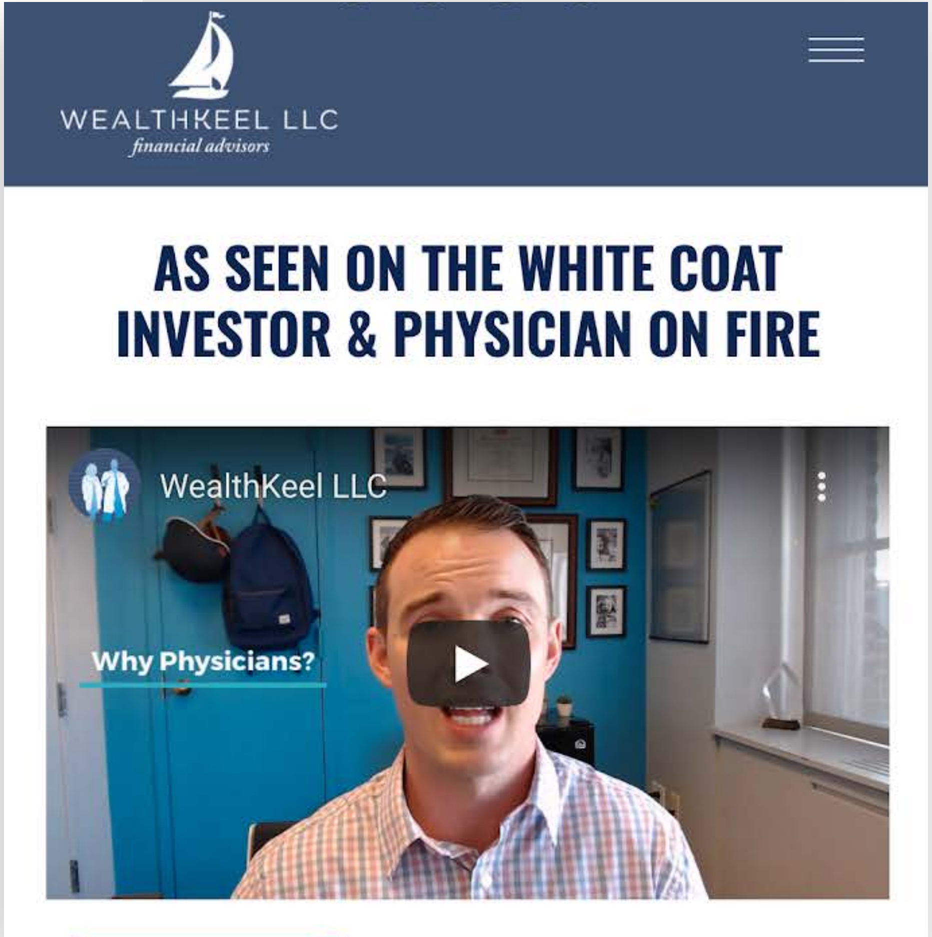
Show Some Personality

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



People Connect with People, Not Brands

Include a “Welcome Video” on Homepage



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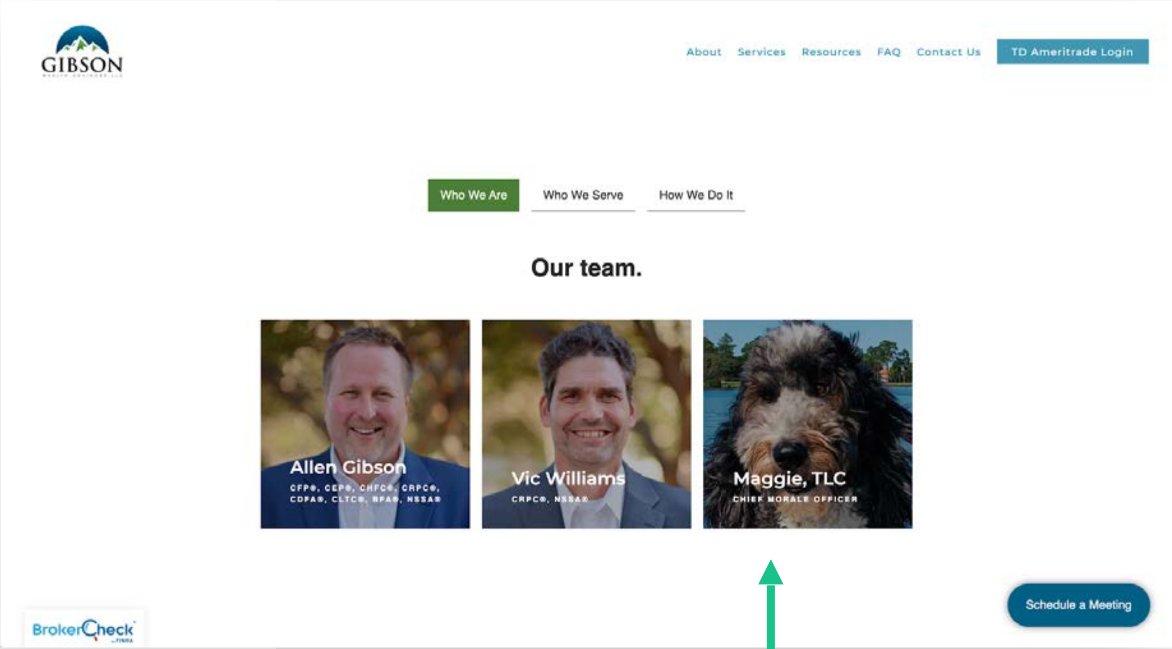
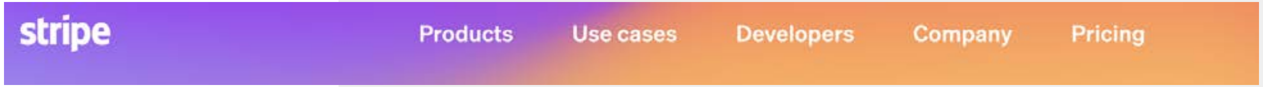
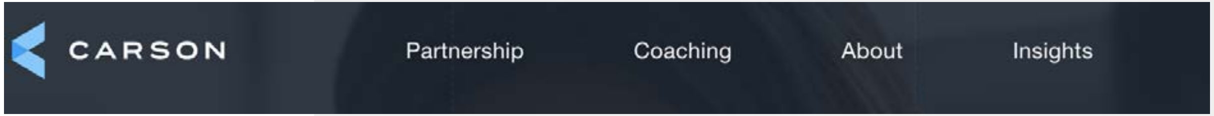
Move "offline" conversation starters online



Website Dont’s

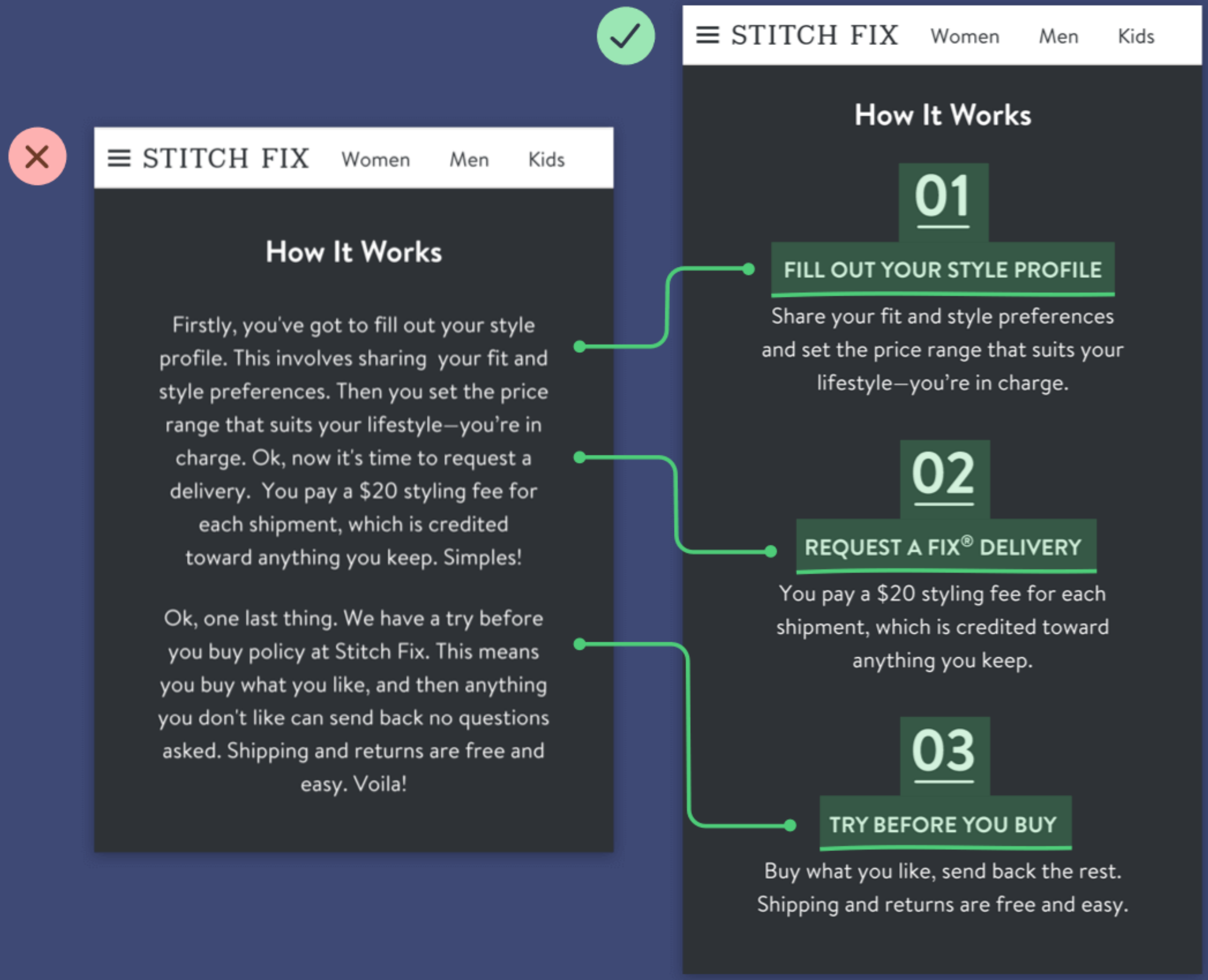
Don’t Have more than 5 pages in the main navigation





Don’t Make Your Site Hard to Read.

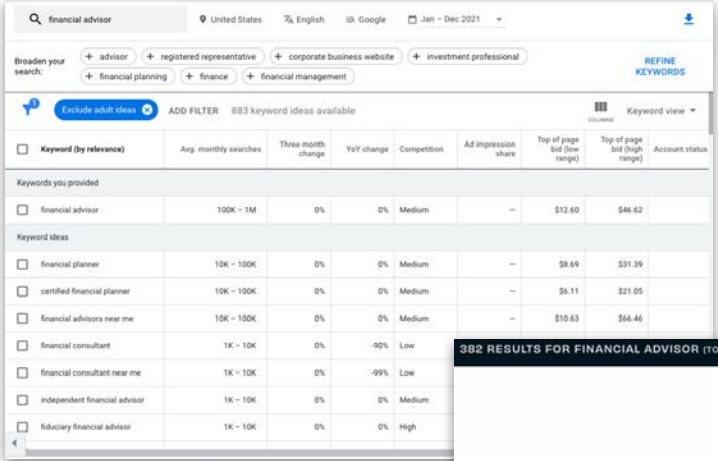
Make Copy Easy to Scan

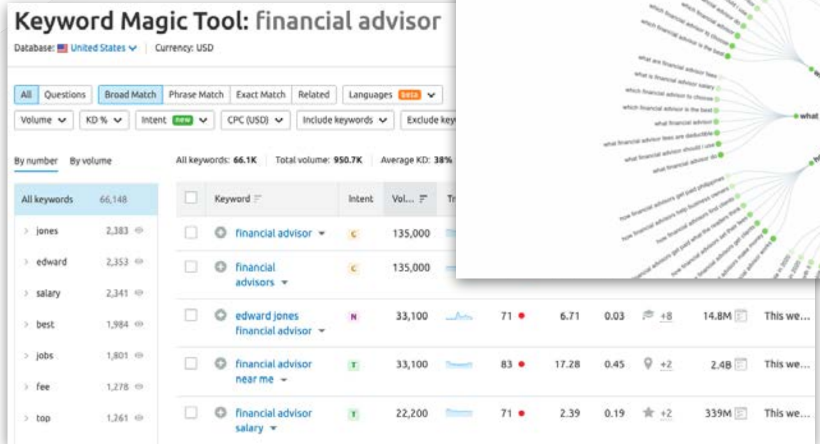


Don’t ignore SEO basics!

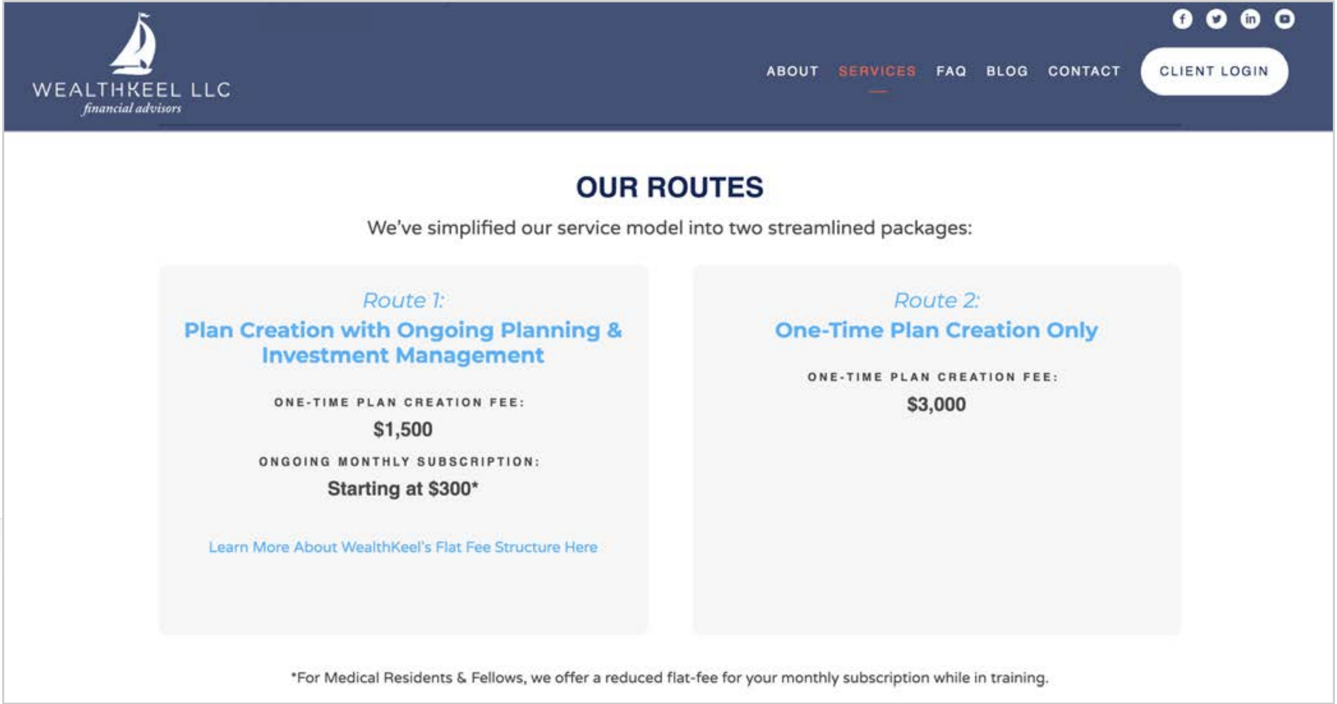
Know your keywords
- Static content
- Frequently updated content

Hit the big 4:
- Page title
- Metadescription
- H1
- Alt text





Don’t hide your fees



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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

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TALK TO SALES

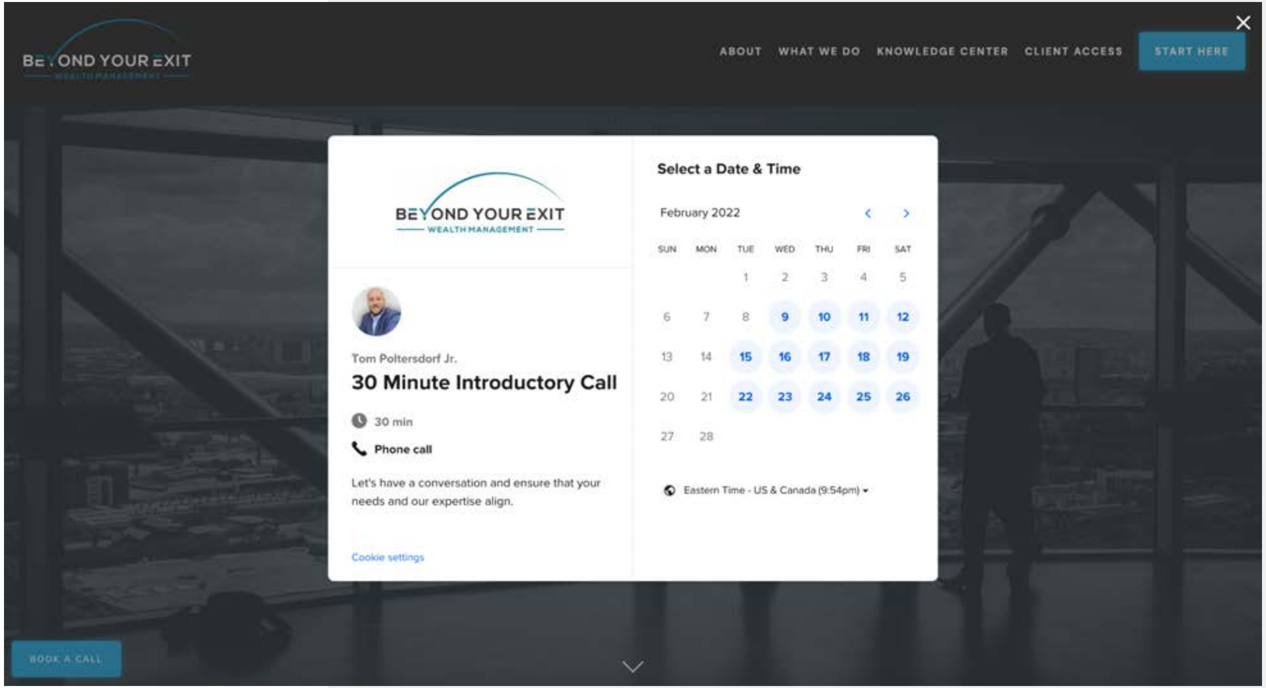
For everyone who wants to better manage their personal finances. Financial Planning services are charged as a fixed fee, at **$500/month**, or **$6,000/year**. Note: Our Financial Planning service is offered at no additional cost to our Family Office clients.

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

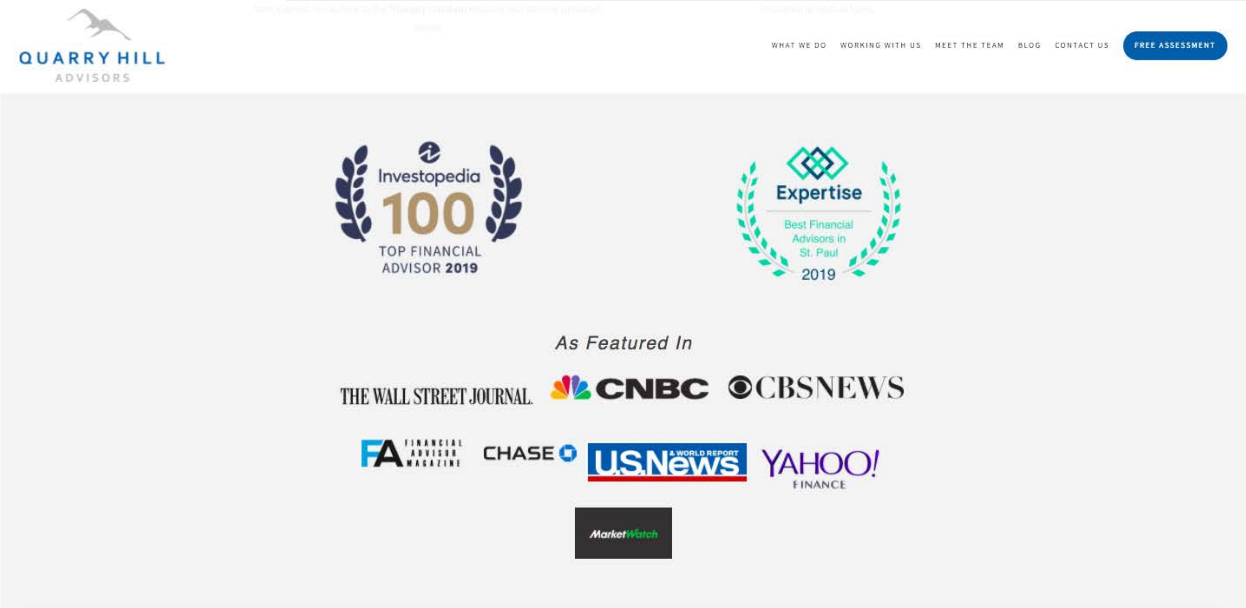
- **Basic Planning:** including identifying financial goals, evaluating financial statements, cash flow management, financial counseling, and debt management.
- **Education Planning:** including education needs analysis, education savings vehicles, financial aid, gift/income tax strategies, and education 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

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



Don’t Be Afraid to Toot Your Own Horn.



Above all…

Don't be boring.

Questions?

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Samantha Russell

Chief Evangelist

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/samanthacrussell

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