

The advisor's guide to a website that works

by Catherine Harold and Kari Olivier

Take a look at your website. Do you tout your firm as being fee-only? Do you put your independence front and center? Do you talk about your commitment to acting in clients' best interests? Great! Those are excellent descriptions of a powerful business model. But if you're using these qualities to differentiate your firm, think again.

Almost every Registered Investment Advisor (RIA) can—and does—say the very same things. Which means the qualities you're relying on to make your firm stand out could actually be burying your message in the noise. What can an effective website do for your firm? Take a look at these five key benefits and the steps you can take to reach them.



DIFFERENTIATE YOUR FIRM

You can—and should—expect your website to help differentiate your firm. But to do it, you need to tell a story that's all your own. Something different than what other RIAs can say.

That means stepping beyond the pillars of the RIA model and offering prospects and clients a more personal window into your firm. What do you do better than most? What are the individual reasons why you and your staff decided on careers in financial services? What gives you a sense of satisfaction from helping clients?

Thinking through what you and your staff personally bring to situations at work and home is a valuable exercise. We think of it as uncovering your special sauce—those soft skills, talents, and traits you bring to your work and daily life that have unique value and currency.

By articulating and owning your special sauce, you can stand out to clients and prospects. Because ultimately, you are what differentiates your firm.

HOW TO DO IT

- Write your origin story
- Define your special sauce >



ENHANCE YOUR BRAND

Your brand is your emotional connection with the people who make you successful. And it holds the key to keeping your most important relationships strong and active.

Typically, you have only seconds or minutes to catch the attention of the audiences you want to reach. So you need a clear and compelling expression of who you are as a firm, what you offer, and the personality you bring to all your firm's interactions.

That means immediately conveying the core strength of your offer, who you serve best, what makes you unique and believable, and the attributes that define your brand.

Once you develop that intel, you can then construct a brand framework that acts as your north star to guide all your messages and communications, including on your website and in other elements of your digital presence.

HOW TO DO IT

- Identify your three Ps >
- Develop your brand framework



TARGET YOUR IDEAL CLIENTS

Your firm's long-term growth and success depend on engaging your audience in relevant conversations and meaningful experiences. That takes two important steps. First, you need to get clear on exactly who you're trying to reach. And second, you need to understand what matters most to that subset of people.

Ideally, the prospects and clients you most want to reach should see themselves right away in what your website shows and says. They should feel you're talking directly to them. And they should find it easy to begin a dialogue with you.

HOW TO DO IT

- [Create your ideal client personas](#)
- [Understand their demographics >](#)



STRENGTHEN YOUR DIGITAL PRESENCE

Your website isn't the only place your brand should stand out in the digital space. Once upon a time, RIAs shied away from digital platforms to avoid running afoul of compliance and regulation forces. Not so any more. Now you can—some would say must—develop a robust digital presence that meets compliance norms while also reaching prospects and clients where they most hang out: online.



ENGAGE YOUR AUDIENCE

Being on the right screen at the right moment sets you up to engage your audience. Then you have to follow through with content that seals the deal. Your expert point of view (POV) is one of your most valuable assets and is easily offered by a well-written blog or opinion piece. Use search optimization to make sure your blog—and your website—can be easily found, high up in Google's search results.

You're an undisputed expert in the world of financial services. For all the identity- and brand-building steps outlined here, we're convinced you'll get better results when you work with an outside marketing expert to tune up your brand and market like a pro.

HOW TO DO IT

- [Build a social media plan](#)
- [Use LinkedIn like an expert >](#)

At Jute Creative, we offer workshops, coaching, tools, and creative services tailor-made to help RIAs succeed.

Let's talk about how we can help you.

