



AI Visibility Starter Checklist for Financial Advisors

1 Get Your Identity Clear (Entity Health)

AI needs to clearly understand **who you are and what you do**.

- ✓ Use one consistent firm name everywhere (website, Google, LinkedIn, directories)
- ✓ Clearly state:
 - Who you help
 - What type of advisor you are
 - Where you operate
- ✓ Make sure your “About” page answers this in plain language
- ✓ Confirm your Google Business Profile is complete and accurate
- ✓ List advisors, credentials, and leadership clearly on your site

Quick check: Ask AI: “*What kind of financial advisor is [Your Firm Name]?*”

If the answer is vague or incorrect, start here.



2 Build Trust Signals AI Can Verify (Brand Authority)

AI looks for **third-party validation**, not just self-descriptions.

- ✓ Collect and maintain Google reviews
- ✓ Ensure credentials and affiliations are visible (CFP®, CFA®, fiduciary, etc.)
- ✓ Be listed consistently in:
 - Advisor directories
 - Professional associations
 - Local or industry publications
 - Publish at least one educational insight (not promotional)
 - Keep bios and profiles current across platforms

3 Get Listed Where AI Cross-Checks You (Directories & Reviews)

AI confirms credibility by **repeating signals across trusted sources**.

Reviews & Local Platforms

- ✓ Google Reviews
- ✓ Yelp
- ✓ Ensure business name, address, and description match exactly

Professional & Advisor Directories

- ✓ Financial Planning Association (FPA) directory
- ✓ CFP Board directory
- ✓ NAPFA (if fee-only)
- ✓ XY Planning Network (if applicable)
- ✓ Broker-dealer or RIA directories tied to your firm

Important: Inconsistent listings reduce trust — even if each listing looks fine on its own.



4 Content Optimization (AEO): Teach AI What You're Known For

AI surfaces **clear answers and structured expertise**, not marketing copy.

Core Content

- ✓ Add an FAQ section that answers:
 - Who you're a good fit for
 - How you work with clients
 - What makes your approach different
 - Use plain language and clear headers
 - Keep content current and accurate

Add Cluster Blogs (High Impact)

Cluster blogs help AI understand your **depth of expertise** and when to surface you.

What this means:

- **Pillar blog** = the main guide on a topic
- **Cluster blogs** = focused articles answering related client questions
- All cluster blogs link back to the pillar

Example

Pillar Blog	Cluster Blogs
How Retirement Planning Works for Families Within 10 Years of Retirement	<ul style="list-style-type: none">• How much risk should I take before retirement?• When should I claim Social Security?• What happens if markets drop right before I retire?• How taxes change in retirement

1. Choose one topic you want to be known for
2. Write one pillar blog
3. Add 3–5 cluster blogs over time



Prompt: Create a Cluster Blog Strategy

Advisors can copy and paste this directly into AI:

Prompt:

1. Act as a financial advisor content strategist
2. My ideal client is: [describe client type]
3. My primary area of expertise is: [retirement, tax planning, women, business owners, etc.]

Create:

1. One pillar blog topic that explains this clearly for clients
2. 8-12 cluster blog topics that answer real client questions
3. How the pillar and cluster blogs should link together

Use clear, client-friendly language and focus on real questions people ask.

5

Watch for AI-Driven Demand Signals

AI influence often shows up **before** traditional marketing metrics.

- ✓ Ask new prospects how they found you
- ✓ **Add a “How did you hear about us?” question to:**
 - Contact forms
 - Scheduling pages
 - Intake questionnaires
- 1. Include AI-specific options:
 - ChatGPT
 - Google AI / Search
 - Perplexity
 - “AI research or recommendation”
- 2. Listen for phrases like:
 - “I asked ChatGPT...”
 - “I did some AI research...”
- ✓ Notice prospects arriving more informed than expected
- ✓ Track inbound interest not tied to ads, events, or referrals

Why this matters: AI-driven discovery often influences decisions without leaving a clear attribution trail. This question surfaces that influence.



6 Reinforce and Correct Regularly (Feedback Loop)

AI understanding can drift without reinforcement.

✓ Quarterly, ask AI:

- “Who is [Your Firm Name] best for?”
- “How does [Your Firm Name] compare to other advisors?”
 - Note gaps or inaccuracies
 - Update your website, FAQs, or profiles to clarify
 - Re-check after updates

If You Only Do Three Things

Start here:



Tighten your
About page



Add a simple
FAQ section



Make sure your
**Google profile and
reviews** are accurate

That alone meaningfully improves how AI understands and surfaces your firm.