



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
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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.

