Website Design Checklist

Your website is the hub of your prospecting and client engagement strategy. Follow this checklist on optimizing your website to help reinforce your brand, build trust and increase engagement.

Website Basics

- ☐ Personal picture(s) (in a carousel)
- ☐ Message and imagery that resonate with target clientele
- ☐ Call-to-Action to prompt lead generation
- ☐ Educational content (keep it up-to-date)
- ☐ One clear goal on each page
- ☐ Simple navigation
- ☐ Bold colors (no more than three)
- ☐ Intro video (optional but recommended to increase engagement)

Profile Details

- ☐ **Who are you?**
  - o Professional picture
  - o Compelling bio (what makes you different?)
  - o Certifications
  - o Team information (including bios and pictures)
  - o Location and contact information (phone, email, address, social media, etc.)
  - o Broker-dealer affiliations
  - o Facebook and/or LinkedIn connections
- ☐ **What do you do?**
  - o General description of services
  - o Details about services provided to differentiate your practice
  - o Description of your investment management process
  - o Client service calendar of ongoing services
- ☐ **Who do you do it for?**
  - o Clearly identify who you work with and how you can help them
  - o Describe minimums and other requirements

Visitor Engagement

- ☐ Client account login
- ☐ Financial advisor blog (keep it up-to-date)
- ☐ Videos to explain what you do and to showcase your expertise
- ☐ Presentations on life events/topics
- ☐ Additional tools visitors can use to engage (e.g. Riskalyze)
- ☐ Calls-to-Action (book a meeting, contact us, etc.)
- ☐ Events page & registration (seminars, client appreciation events, local Rotary club meeting, etc.)
- ☐ Testimonials page (optional)

Calls-to-Action

- ☐ Have visible Calls-to-Action (CTAs) to prompt engagement (at least 5 on homepage)
- ☐ Offer a compelling lead magnet and CTA (eNewsletter, calculator, podcast, white paper, eBook, etc.)
- ☐ Create regular blog updates demonstrating your expertise to be emailed periodically to your growing contact list
- ☐ Install and configure Google Analytics to measure the conversion rate of the goal
- ☐ Add icons indicating where you've been published or interviewed (Bloomberg TV, CNBC, WSJ, etc.)

Additional Tips

- ✓ **Simple navigation** — Keep your website navigation concise and organized, since the structure of your website gives visitors a sense of how you conduct your practice
- ✓ **Opt for a flexible, responsive design** — Choose a flexible site layout that is mobile responsive; Broadridge provides modern designs to enhance your web visitors' experience and give you the most branding flexibility
- ✓ **Create a custom biography page** — Title the page "*About <Your Name>*"; provide a mix of professional and personal details to give prospective clients an understanding of who you are as they determine whether you're the right match for their needs
- ✓ **Select 3 to 5 general business services to highlight** — Think conceptually about the main services that generate referrals for your business, such as Comprehensive Financial Planning, Retirement Planning, Investing and Wealth Management
- ✓ **Create a custom page highlighting your business focus** — Consolidate the business services selected above and incorporate them as titles of the page to increase the relevance of your website; integrate your process and perspective on each of the topics, keeping it high level to encourage referrals to contact you to learn more
- ✓ **Focus on pictures** — Integrate pictures throughout your website to help tell your story and form a personal connection; Broadridge offers access to stock images as part of your website subscription
- ✓ **Include trust-building content** — Make your website a go-to resource for prospects and clients by including compelling educational resources; Broadridge includes FINRA-reviewed content as part of your website subscription
- ✓ **Incorporate Calls-to-Action throughout your website** — There are multiple potential paths through your website, so you will want to incorporate a CTA on nearly every page
- ✓ **Communicate realistic expectations and leave out the hype** — Set the stage for realistic expectations by communicating what clients should expect from you *and* what you expect from clients; keeping your content authentic will help set realistic expectations and attract the right clients for your practice
- ✓ **Use conversational English** — Write from your own voice and perspective in first person
- ✓ **Write for the Web** — Keep paragraphs short and limit the number of paragraphs per topic; this minimizes scrolling and helps ensure that visitors read all your text
- ✓ **Use Search Engine Marketing and Digital Advertising to be seen** — Consider using Sponsored Name Placement, Local Business Listings and Digital Advertising for cost-effective ways to drive more traffic to your website; Broadridge is here to help you increase your digital footprint

Discover more ways to turn your website into a client engagement platform.

Contact Broadridge Advisor Solutions
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