Websites *That Work*

Three simple ways to get better results from your website

LIMITLESS

👋 Hi, I'm Greg

Your website needs to do more for you than look pretty…

It needs to drive results.

A Website that Works can help…

Your ideal client recognizes they’re a good fit within the first few seconds of visiting your website

You stand out from other advisors with a brand story and message that puts your ideal clients first

Deliver a discovery process that your ***ideal client wants to sign up*** for

3 Strategies / 3 Core Pages

- → The “Perfect” Home Page
- → The “Upside Down” About Page
- → The Schedule A Call Page

LIMITLESS


INFORMATION

What we'll do

- Training: 3 core strategies/pages
- Examples to use as a starting point 😎
- Simple action steps 🥳
- (Live Q&A) Take notes and we'll come back to you!

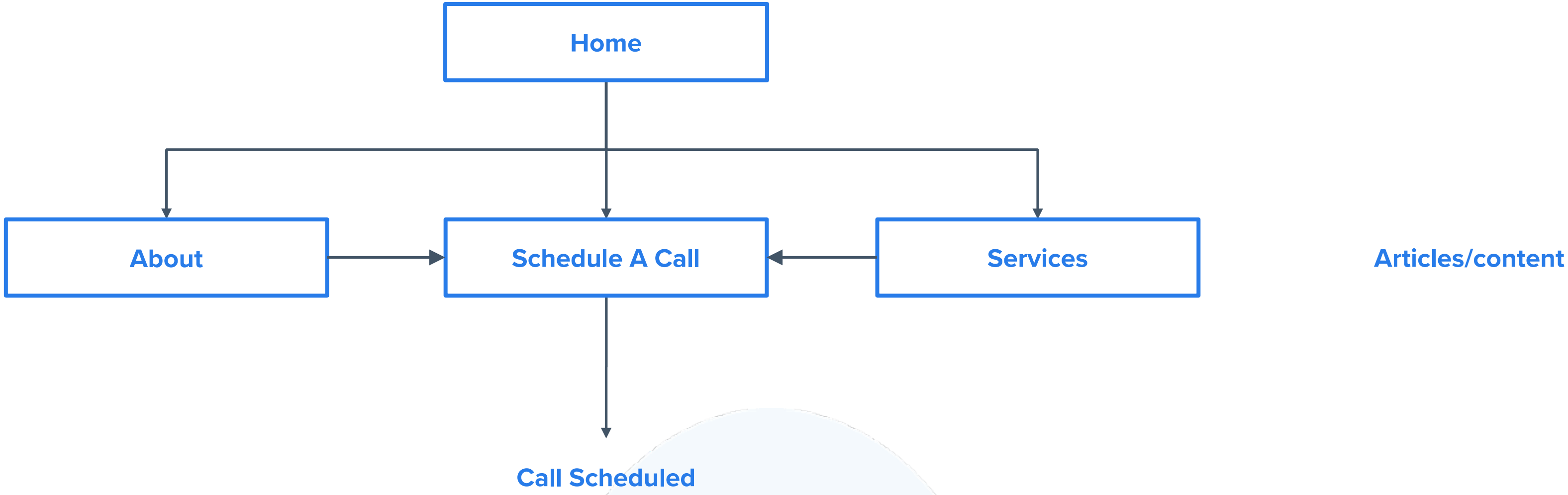
1

The “Perfect” Homepage

Your ideal client recognizes they’re a good fit within the first few seconds of visiting your website, takes the next step

Top Level Pages

Prospects typically visit these pages before scheduling a call to check fit



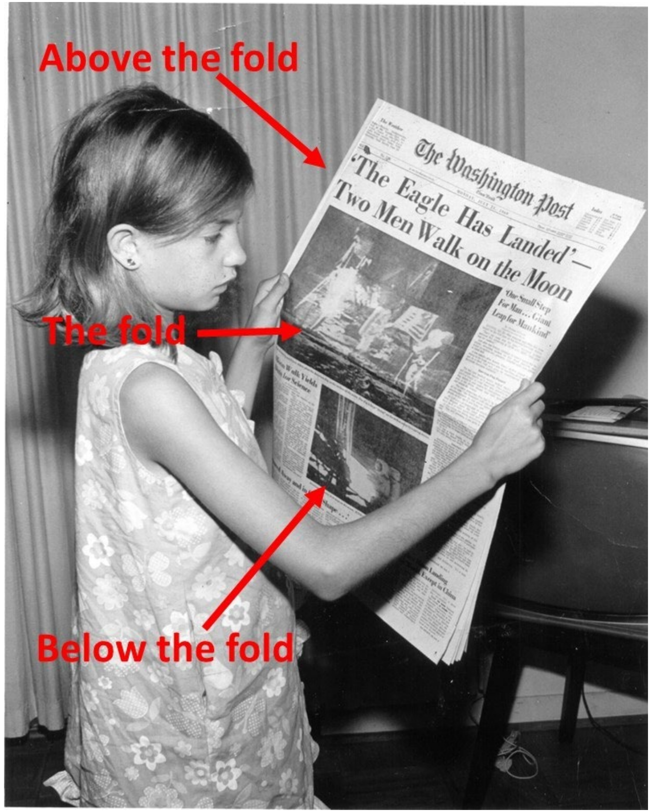
The “Perfect” Home Page

- Abundantly clear in the first few seconds:
  - What you do, who it’s for
  - Where/how to take the next steps
- “That’s me. That’s what I want. How do I start”?

Best way to do that

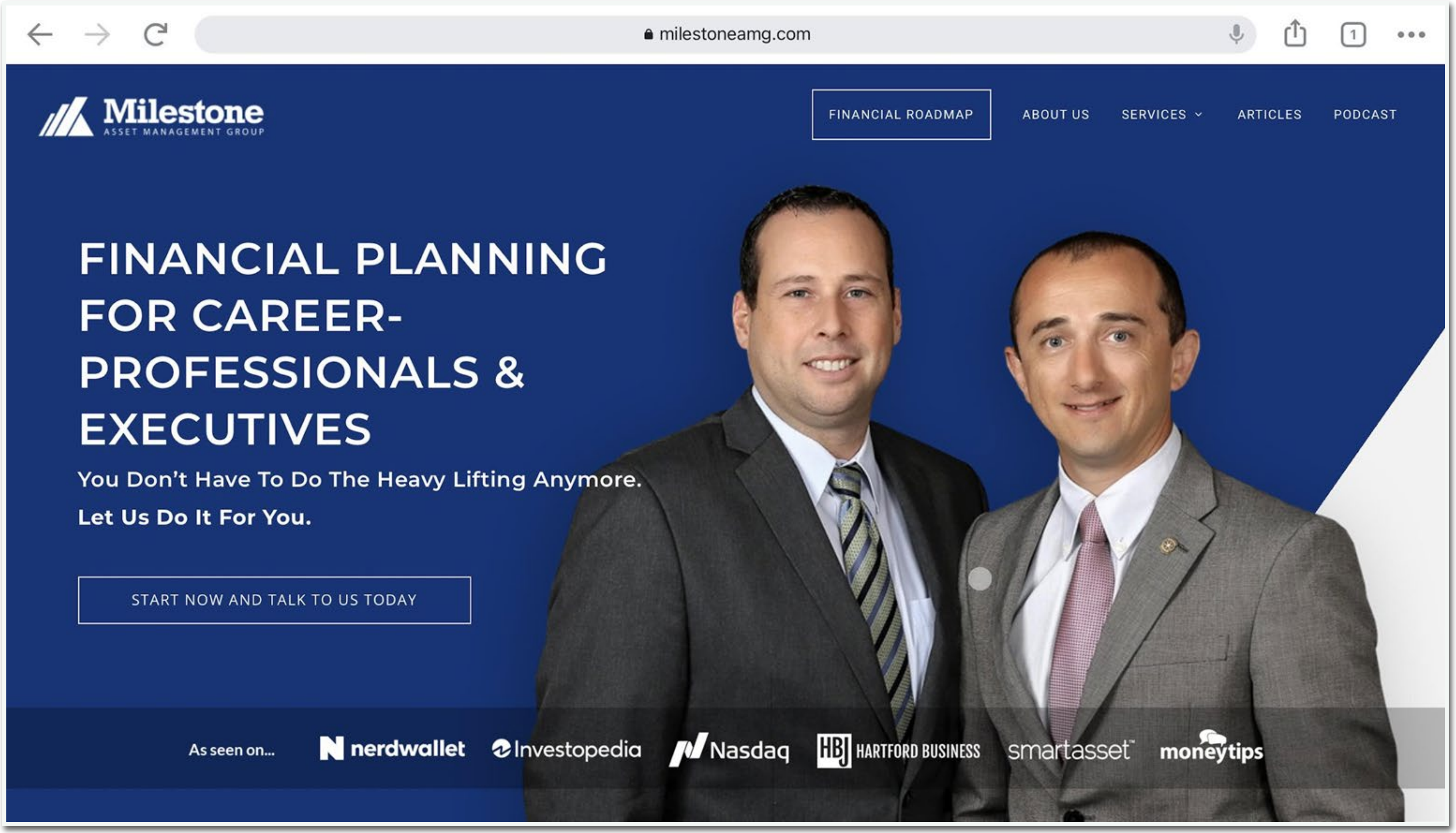
- ➔ A “billboard” above the fold (ATF)

“ATF what??”


Above the fold
The fold
Below the fold
The Washington Post
'The Eagle Has Landed'—
Two Men Walk on the Moon


ABOVE THE FOLD
BELOW THE FOLD

Example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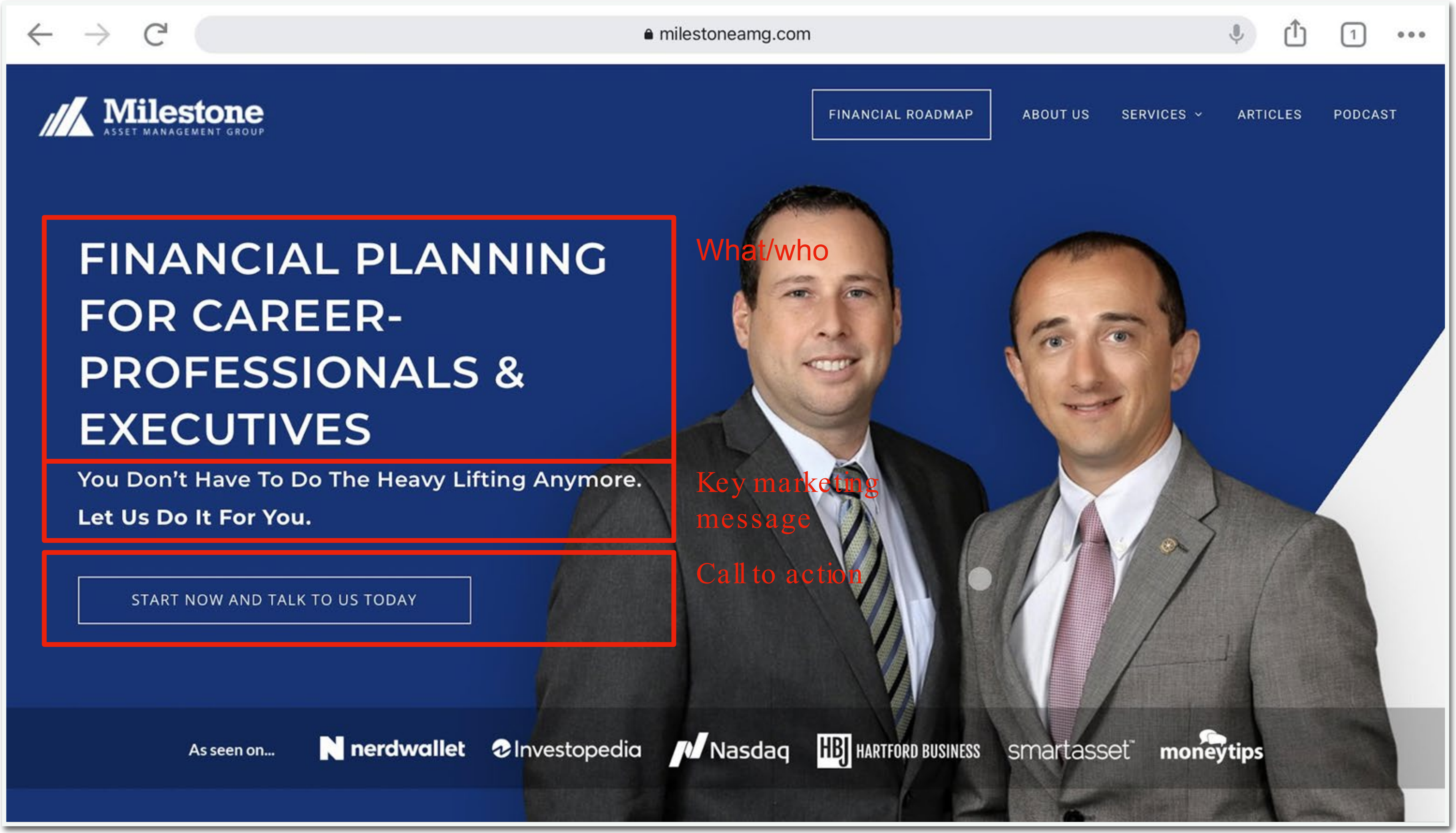
FINANCIAL PLANNING FOR CAREER-PROFESSIONALS & EXECUTIVES
You Don’t Have To Do The Heavy Lifting Anymore.
Let Us Do It For You.
START NOW AND TALK TO US TODAY
As seen on...
nerdwallet
Investopedia
Nasdaq
HBJ
HARTFORD BUSINESS
smartasset
moneytips

Above the fold “billboard” includes…

- ➔ Headline: what you do and who it’s for
- ➔ Subheadline: key marketing message (what they want)
- ➔ Call-to-action: the #1 thing you want prospects to do next
    - ◆ “That’s me. That’s what I want. How do I start”?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Milestone
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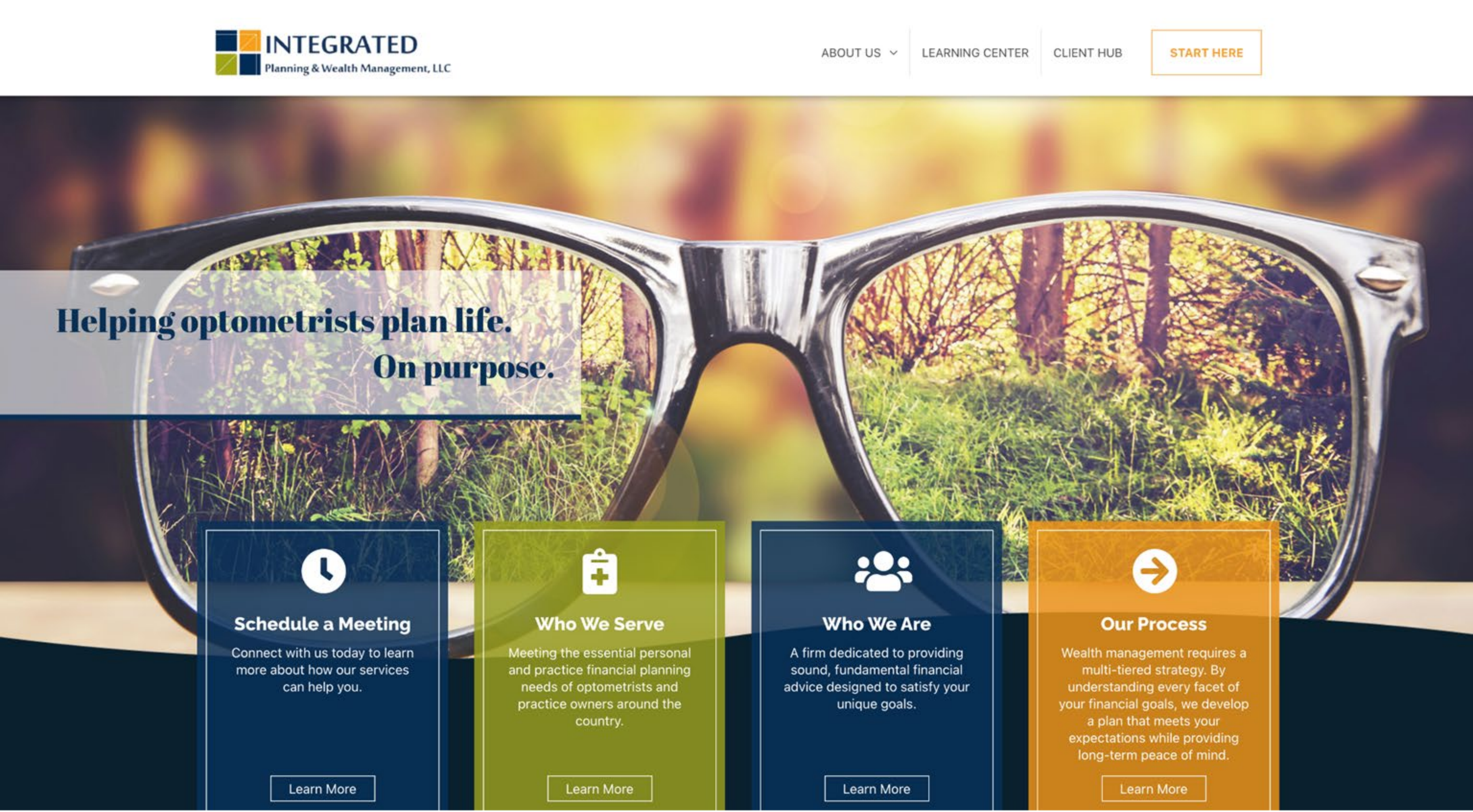
Above the fold: before & after


INTEGRATED
Planning & Wealth Management, LLC
ABOUT US
LEARNING CENTER
CLIENT HUB
START HERE
Helping optometrists plan life.
On purpose.
Schedule a Meeting
Connect with us today to learn more about how our services can help you.
Learn More
Who We Serve
Meeting the essential personal and practice financial planning needs of optometrists and practice owners around the country.
Learn More
Who We Are
A firm dedicated to providing sound, fundamental financial advice designed to satisfy your unique goals.
Learn More
Our Process
Wealth management requires a multi-tiered strategy. By understanding every facet of your financial goals, we develop a plan that meets your expectations while providing long-term peace of mind.
Learn More

Financial & Retirement Planning for Optometric Practice Owners

Manage Cashflow | Reduce Taxes | Invest Prudently

Click Here to Get Started

Our calls are always relaxed and pressure-free. Guaranteed.

Integrated Planning
& WEALTH MANAGEMENT

Podcast | About | Services | Learning Center | Client Login | Book a Triage Call

Financial & Retirement Planning for Optometric Practice Owners

What/who

Manage Cashflow | Reduce Taxes | Invest Prudently

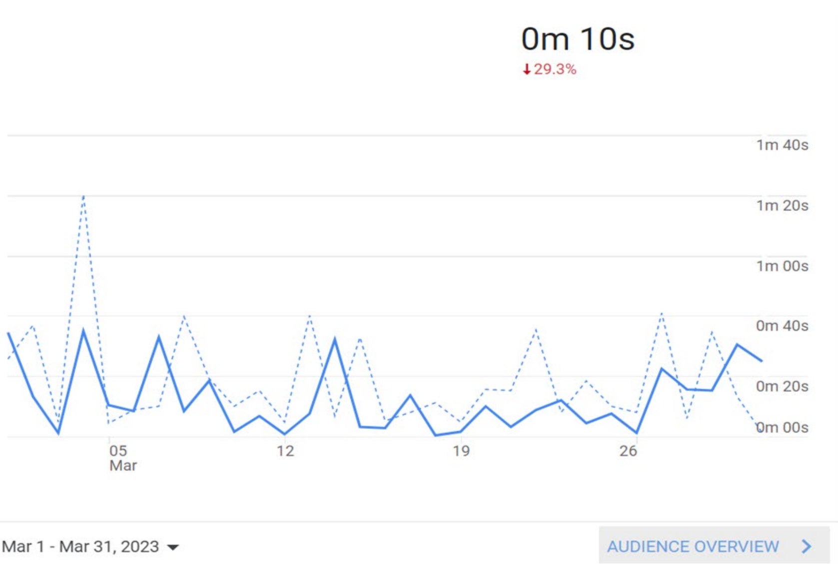
Key marketing message

Click Here to Get Started

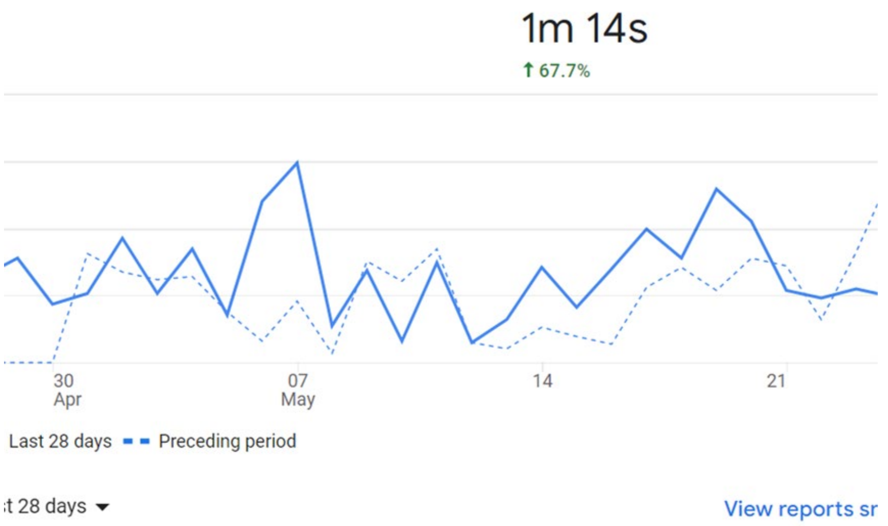
Call to action

Our calls are always relaxed and pressure-free. Guaranteed.

Before



After



In a nutshell…

➔ If your home page speaks to your ideal client they will stay on your website longer, explore your ***Top Level pages***, and are more likely to *become a lead*.

“We’ve doubled daily sign-ups to our email newsletter in the first month since the new site launched.”

ADAM CMEJLA CFP®
Integrated Planning and Wealth Management

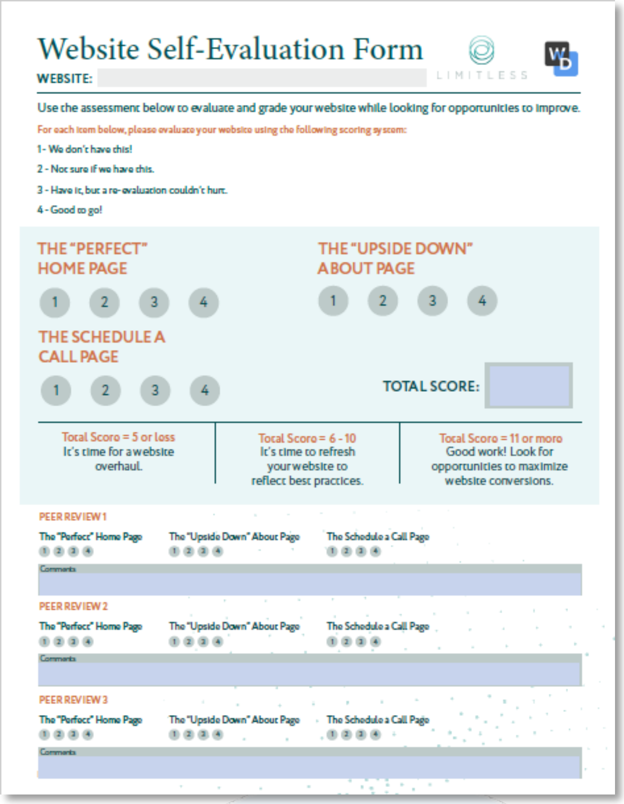
“Last week, we got 8 leads just from our website.”

Erik Young, AAMS®
Financial Planner, Valtinson Bruner Financial Planning

Perfect Home Page Summary

- ➔ Abundantly clear in the first few seconds:
  - What you do, who it's for
  - Where/how to take the next steps

Action steps



Website Self-Evaluation Form

LIMITLESS

WEBSITE:

Use the assessment below to evaluate and grade your website while looking for opportunities to improve.

For each item below, please evaluate your website using the following scoring system:

1 - We don't have this!

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4 - Good to go!

THE "PERFECT" HOME PAGE

1 2 3 4

THE "UPSIDE DOWN" ABOUT PAGE

1 2 3 4

THE SCHEDULE A CALL PAGE

1 2 3 4

TOTAL SCORE:

Total Score = 5 or less It's time for a website overhaul.	Total Score = 6 - 10 It's time to refresh your website to reflect best practices.	Total Score = 11 or more Good work! Look for opportunities to maximize website conversions.

PEER REVIEW 1

The "Perfect" Home Page 1 2 3 4 | The "Upside Down" About Page 1 2 3 4 | The Schedule a Call Page 1 2 3 4

Comments

PEER REVIEW 2

The "Perfect" Home Page 1 2 3 4 | The "Upside Down" About Page 1 2 3 4 | The Schedule a Call Page 1 2 3 4

Comments

PEER REVIEW 3

The "Perfect" Home Page 1 2 3 4 | The "Upside Down" About Page 1 2 3 4 | The Schedule a Call Page 1 2 3 4

Comments

- ➔ Review your website evaluation worksheet
- ➔ For "Perfect Home Page" grade yourself on scale of 1-4
- ➔ Consider...
  - ◆ What you do
  - ◆ Who it's for
  - ◆ The next step

2

The “Upside Down” About Page

Stand out from other advisors with a brand story and message that puts your ideal clients first

Typical analytics Top Level pages

Page	Views	Average time on page
Home/	54.83%	00m33s
About/	22.50%	01m03s
Start here/	11.25%	00m31s
Services/	6.33%	00m09s

What do your prospective clients want to see?

- ➔ There wasn't enough info to figure out if we wanted to work with them or not. It was too vague. Platitudes. I want to know about what you do, your background, your experience. Do you have a background in business? What are your life experiences? Give me a better feel for you, your company, *and how you can help me.* These are the things we needed to see to know if we even wanted to schedule a call in the first place. I wanted to know more about who I was engaging with and *if we held any common ground.*

Does this sound familiar?

- ➔ About ABC Financial: we are more than a team of advisors - we are your strategic partners. Deeply committed to providing personalized financial strategies that align with your needs and objectives.
  Our firm is staffed by a diverse group of experienced innovative professionals to help you navigate the complexities of blah, blah, blah...

Lame.

The point

- ➔ Your prospect's intention is not to learn about you...
- ➔ It's to learn about what you can do for them
- ➔ When most advisors talk about themselves, you can talk to your ideal clients
- ➔ Flip the script!

The “Upside Down” About Page

1. **Identity bullets:** topics/questions that are on the minds of your ideal clients
2. **Service promise:** how you are positioned to help solve those problems
3. **Call to action:** where to go next to get those problems solved

Examples

So, when our clients find us, they come with a lot of questions:

- How will I know when working in my practice is a matter of choice for me?
- Is it too late (or too soon?) to start working with a financial advisor?
- What if I want to sell my practice? What are the correct steps to take?

Identity bullets

We help you turn your practice into an asset that frees your time.

Service promise

Then, whether you want to grow your business further, optimize it for selling someday, or just have the time to take your kids to the waterpark on a Wednesday afternoon...

You know you have the option.

It's never too soon — and never too late — to have a plan.

Whether you want to work for another year or the next twenty, we'll help you bring out your practice's full potential so that the choice is yours... and on your terms.

As Adam, our founder (who's married to an optometrist by the way) likes to say:

"The juice is worth the squeeze."

Call to action

Ready to get started?

The first step is a short, casual conversation to see if we can help.

Schedule a Call

Identity bullets

- You Took Enormous Risk To Start Your Business
- And Worked Harder Than Most To Get Here
- You Want Help Making Key Financial Decisions
- But You're Cautious About "Advisors" Who Talk A Big Game
- You Want One Who Can Back It Up

If Any Of That Sounds Familiar...You're In The Right Place.

Whether You're Just Starting Out Or Looking To The Next Chapter...

Our mission is to manage and protect the wealth of business owners and their families.

It All Starts With A Casual Conversation – Click The Button Below To Pick A Time To Chat

Yes, Let's Talk

Not sure where to start?

Talk to your clients!

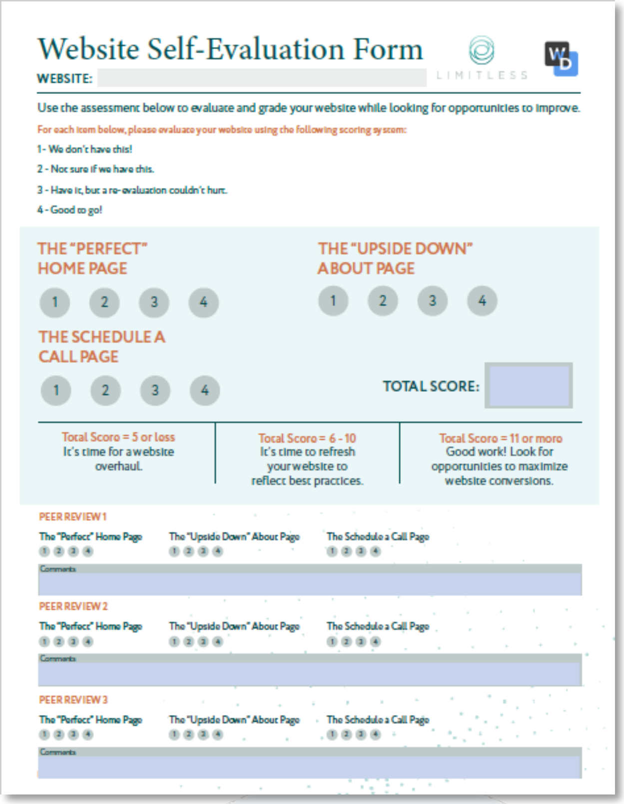
Start here

1. What questions do you get when clients first meet you?
2. What common questions/concerns come up as you serve them?

Upside Down About Page Summary

- ➔ Not there to learn about you
- ➔ There to learn what you can do for them
- ➔ When most advisors talk about themselves, you can talk to your ideal clients

Action steps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Comments

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The "Perfect" Home Page 1 2 3 4 | The "Upside Down" About Page 1 2 3 4 | The Schedule a Call Page 1 2 3 4

Comments

- ➔ Review your website evaluation worksheet
- ➔ For "Upside Down About Page" grade yourself on a scale of 1-4
- ➔ Consider...
  - Identity bullets
  - Questions new clients ask you

3

The Schedule A Call Page

Turn a generic discovery call into a unique process that your ideal client *wants* to sign up for

Schedule a call page: what is it?

- ➔ A page on your website that helps you get qualified discovery calls
- ➔ Encourages those who are a great fit
- ➔ Discourages those who are not ready to sign up yet

Includes three things

1. What it is (the result/intention)
2. Who it's for (three qualifiers)
3. How it works (1-3 steps)

Examples

Integrated Planning
& WEALTH MANAGEMENT

Podcast | About | Services | Learning Center | Client Login | Book a Triage Call

Start Here

Schedule your Triage Call

One 45-min conversation to get clarity on your finances & see if we're a good fit

Book your FREE Triage call today

What it is (intention)

We only work with...

Optometric Practice Owners

We use proven concepts and processes directly tailored to your business model.

Practice Revenue of 850k+

Your practice's trailing 12-month revenue is $850k or more.

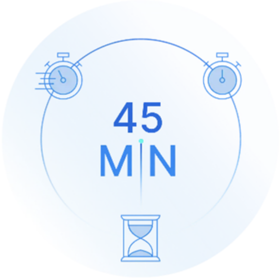
Ongoing "Personal CFO" Partnership

You want the help of a "personal CFO" who specializes in optometrists instead of doing it alone.

Who it's for (3 qualifiers)

How it Works

Book a Triage Call



This 45-minute phone call will help us get a vision of your goals and financial concerns, and make sure we're right for each other.

If we're a good fit, we will explain exactly what you need to do to achieve your financial goals and build the wealth to support the life you desire.

You'll see, at a high level, how our firm can improve your finances and help you build, grow, and preserve your wealth.

At the end of this meeting, there's no hard sell – we'll ask you to take a step back and reflect on whether our expertise will benefit you and your family.

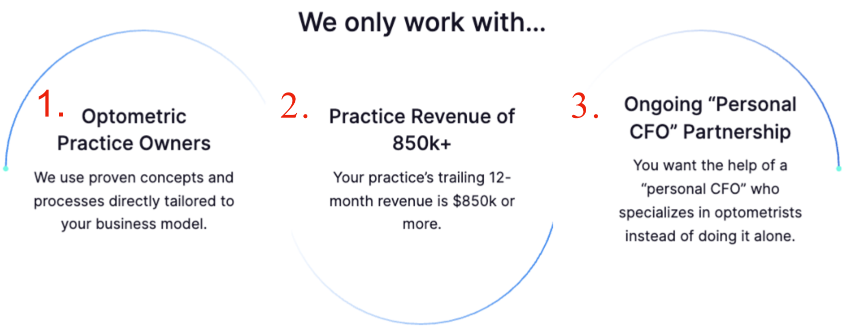
How it works

Schedule a 45-Minute Triage Call

Schedule a Call

Three Qualifiers: what are they?

1. **Ideal Client Identity:** They read this and think "that's me!"
2. **Ideal Client Value:** The monetary metric that quantitatively defines your ideal client
3. **Ideal Client Mindset:** How they think about your working relationship



DESTINYCAPITAL

About ⌄ Services Learning Center ⌄ Contact Client Login **Start Here**

Your Free Remarkable Retirement Roadmap

A 3-step process to get clarity on your finances and test drive our services.

Book your Free Call

What it is
(intention)

Most of Our Clients Are...

Click the arrow to view details about who we serve

- **In or Nearing Retirement**
- **1 Million+**
- **Looking for a Planning Partner For Life & Finance**

Who it's for
(3 qualifiers)

"Triage calls are **down 30%** but we're still signing the same number of clients per month. It's worked perfectly."

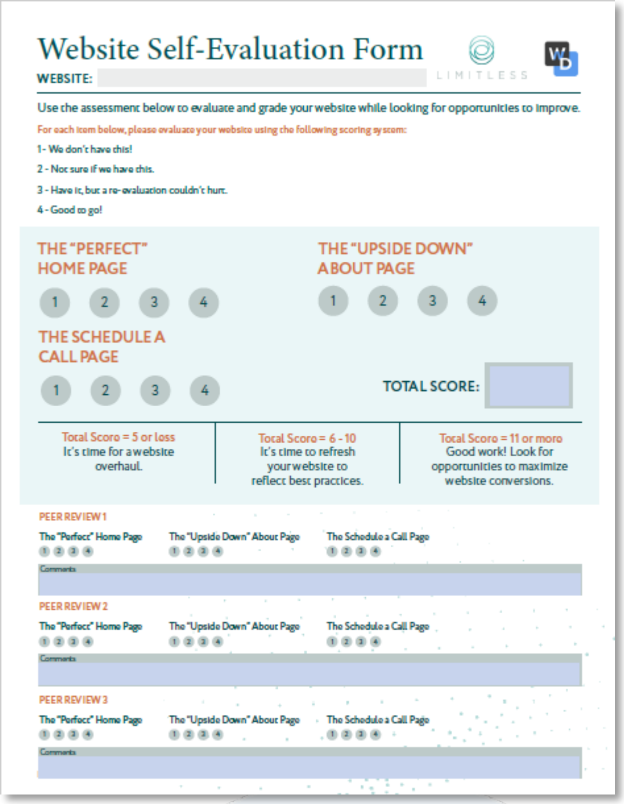
ADAM CMEJLA CFP®
Integrated Planning and Wealth Management

LIMITLESS

Schedule A Call Page Summary

- ➔ A page on your website that helps you get qualified discovery calls
- ➔ Encourages those who are a great fit
- ➔ Discourages those who are not ready to sign up yet

Action steps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Comments

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- ➔ For "Schedule A Call Page" grade yourself on a scale of 1-4
- ➔ Consider...
  - ◆ The result/intention
  - ◆ Three qualifiers
  - ◆ 1-3 steps

Summary: A Website that Works

1

Perfect Home Page

Your ideal client recognizes it and takes the next step

2

Upside Down About Page

You stand out from other advisors with a brand story and message that puts your *ideal* clients first

3

Schedule A Call Page

Your discovery call is a unique process that your ideal client wants to sign up for

Q&A