WEBSITES THAT WORK

👋 Hi, I'm Greg.

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

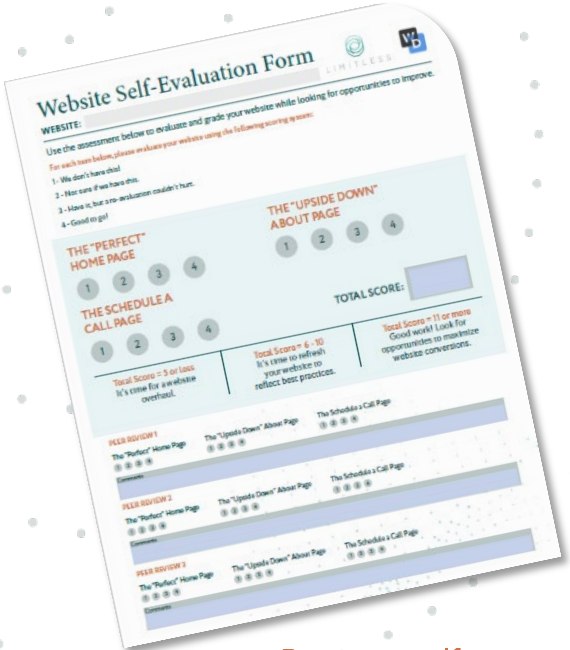
It needs to drive results.

A website that works can help...

Your ideal client recognize they're a good fit within seconds of visiting your website

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

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


Website Self-Evaluation Form

WEBSITE:

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

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.

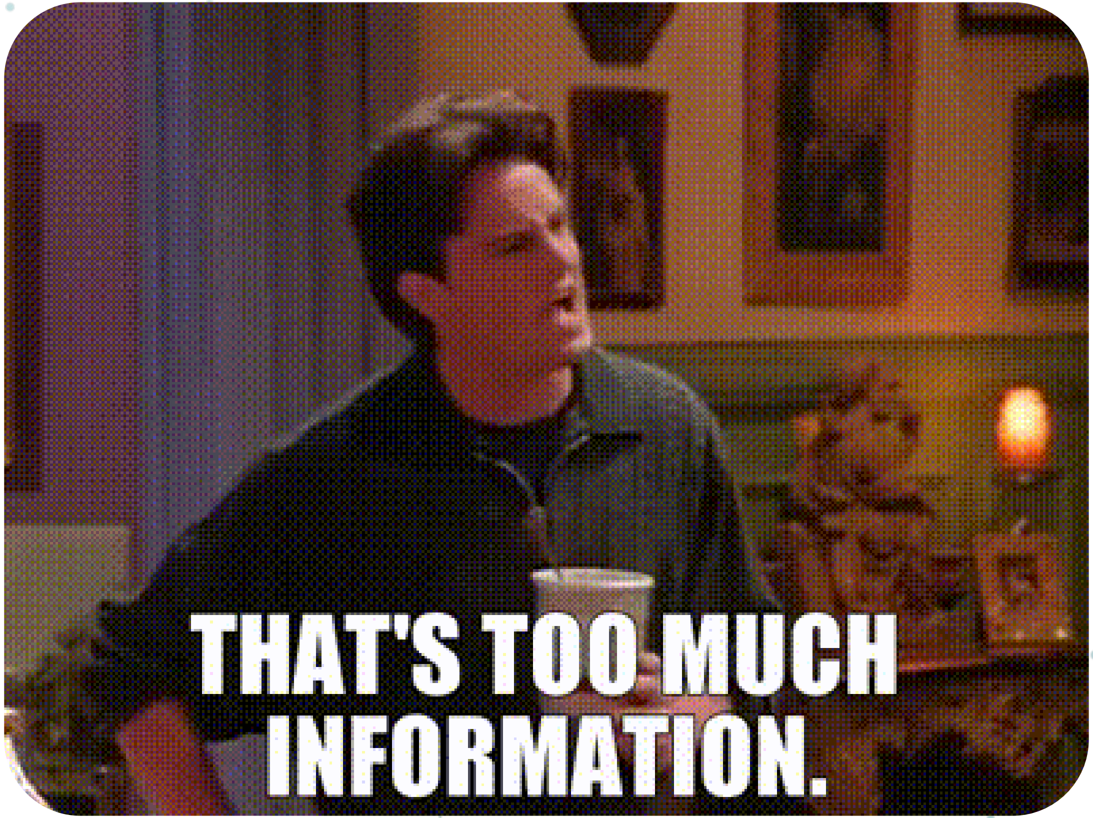
Total Score = 6 - 10 It's time to refresh your website to reflect best practices.

Total Score = 11 or more Good work! Look for opportunities to maximize website conversions.

3 CORE PAGES

1. The “Perfect” Home Page
2. The “Upside-Down” About Page
3. The “Schedule a Call” Page

Rate yourself on your Website Self-Evaluation Form as we go along!


THAT'S TOO MUCH
INFORMATION.

What we'll do...

- Learn 3 core strategies and pages
- See examples to use as a starting point
- Complete 3 work blocks
- Finish with live Q&A and website audits

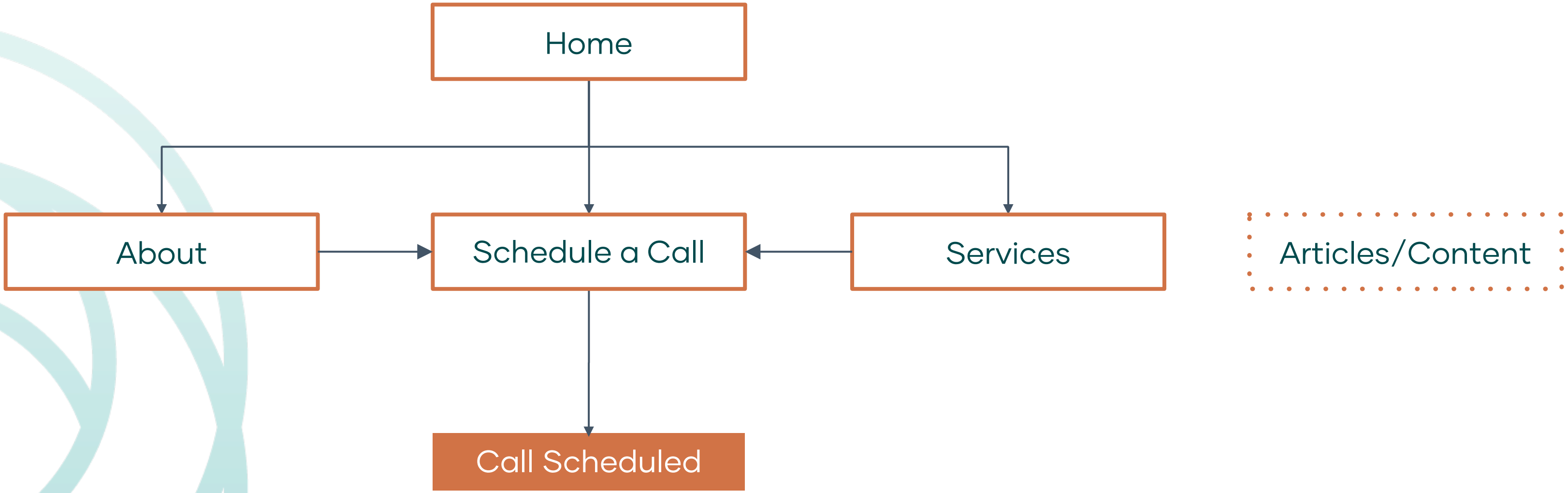
1

The "Perfect" Homepage

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

Top-Level Pages

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



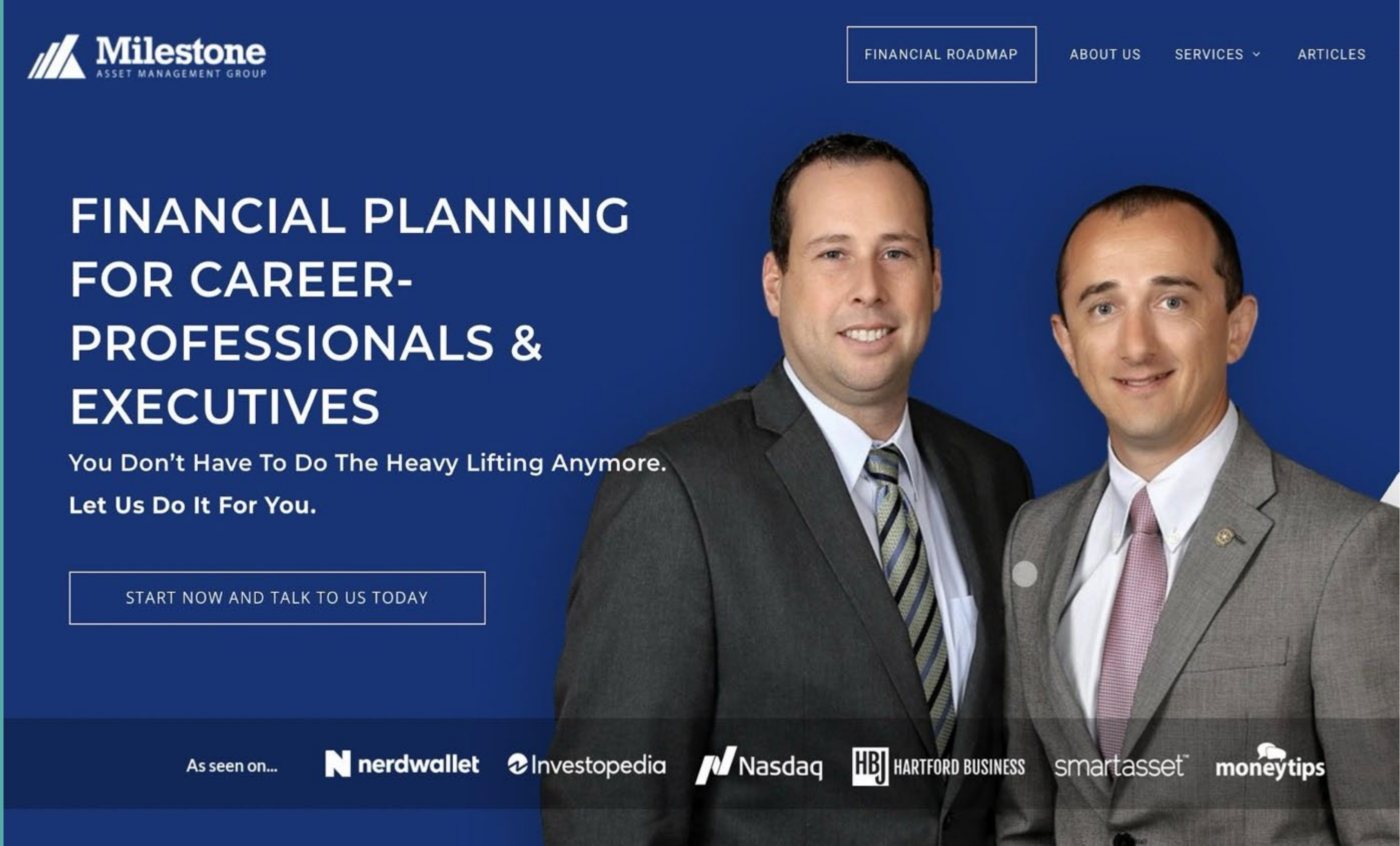
The "Perfect" Homepage

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

EXAMPLE


Milestone
ASSET MANAGEMENT GROUP
FINANCIAL ROADMAP
ABOUT US
SERVICES
ARTICLES
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...

1. Headline: what you do and who it's for
2. Subhead: key marketing message (what they want)
3. Call to action: the #1 thing you want prospects to do next—"That's me. That's what I want. How do I start?"

EXAMPLE


Milestone
ASSET MANAGEMENT GROUP
FINANCIAL ROADMAP
ABOUT US
SERVICES
ARTICLES
FINANCIAL PLANNING FOR CAREER-PROFESSIONALS & EXECUTIVES
What/who
You Don't Have To Do The Heavy Lifting Anymore.
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Key marketing message
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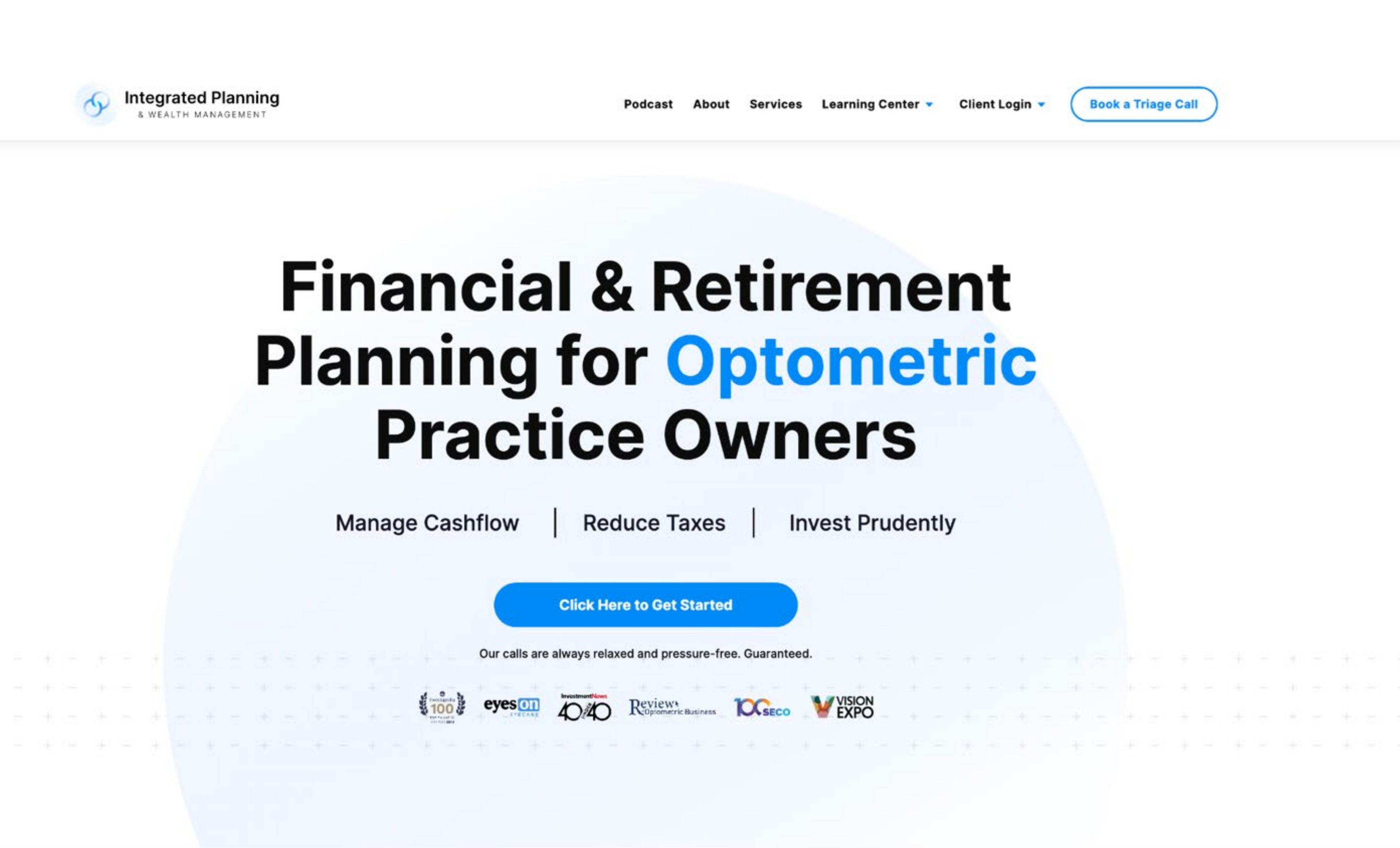
As seen on...
nerdwallet
Investopedia
Nasdaq
HBJ HARTFORD BUSINESS
smartasset
moneytips

BEFORE


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

AFTER


Integrated Planning
& WEALTH MANAGEMENT
Podcast
About
Services
Learning Center
Client Login
Book a Triage Call
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.
VISION EXPO

AFTER

Integrated Planning
& WEALTH MANAGEMENT

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

Financial & Retirement Planning for Optometric Practice Owners

What/who

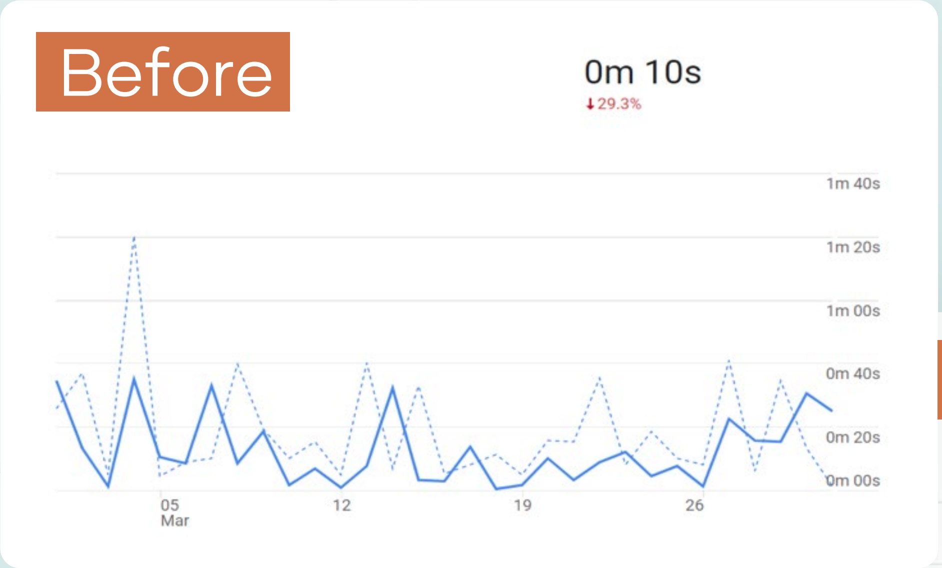
Manage Cashflow | Reduce Taxes | Invest Prudently

Key marketing message

Click Here to Get Started

Call to action

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



If your homepage speaks to your ideal client, they will stay on your website longer, explore your Top-Level Pages, and be more likely to become leads.

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

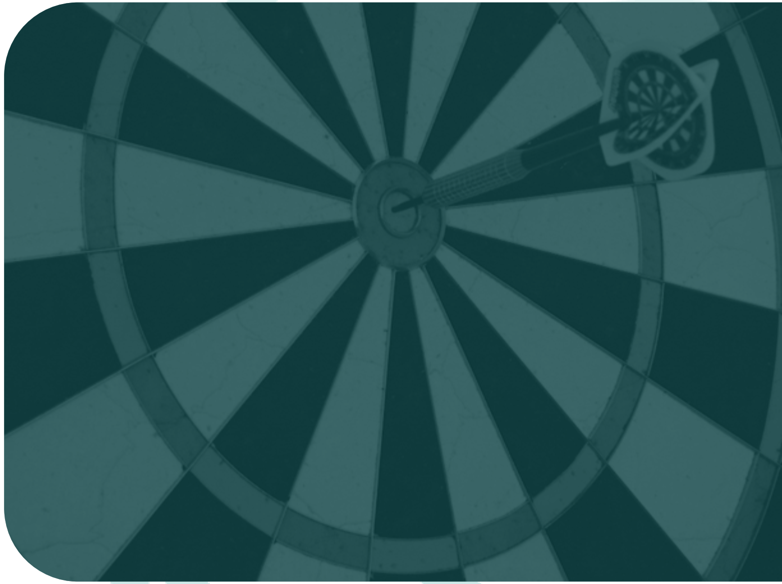
Erik Young, AAMS®
Financial Planner, Valtinson Bruner Financial Planning

“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

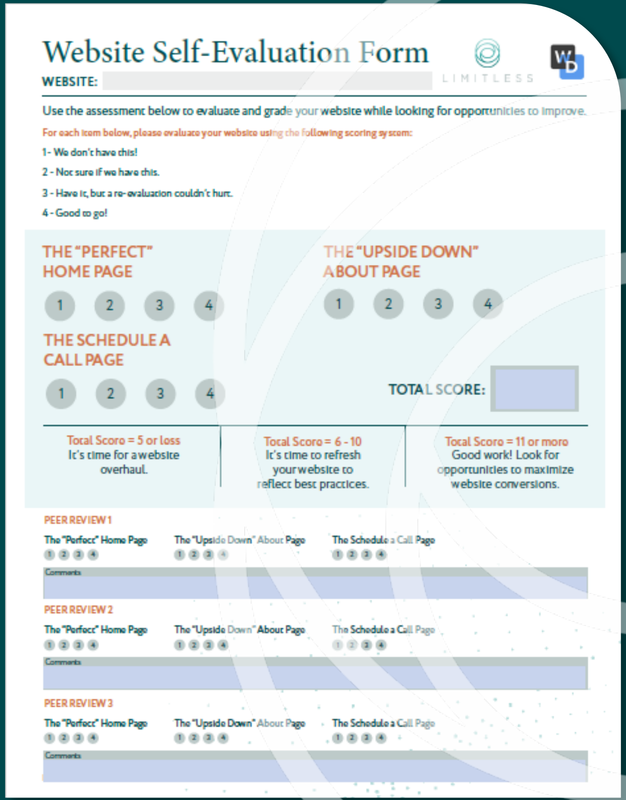
The "Perfect" Homepage Summary

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



RIDE-ALONG

1. Review website-evaluation worksheet
2. Grade yourself on scale of 1–4 based on the “Perfect” Homepage section
3. Consider…
   - What you do
   - Who it’s for
   - The next step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THE “UPSIDE DOWN” ABOUT PAGE

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THE SCHEDULE A CALL PAGE

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Comments

PEER REVIEW 2

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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

2

The "Upside-Down" About Page

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

Top-Level Pages: Typical Analytics

Page	Views	Average time on page
Home	54.83%	33 seconds
About	22.50%	1 minute, 3 seconds
Start Here	11.25%	31 seconds
Services	6.33%	9 seconds

Milestone
ASSET MANAGEMENT GROUP

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."

"I wanted to know more about who I was engaging with and if we held any common ground."

"I want to know what you do. 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."

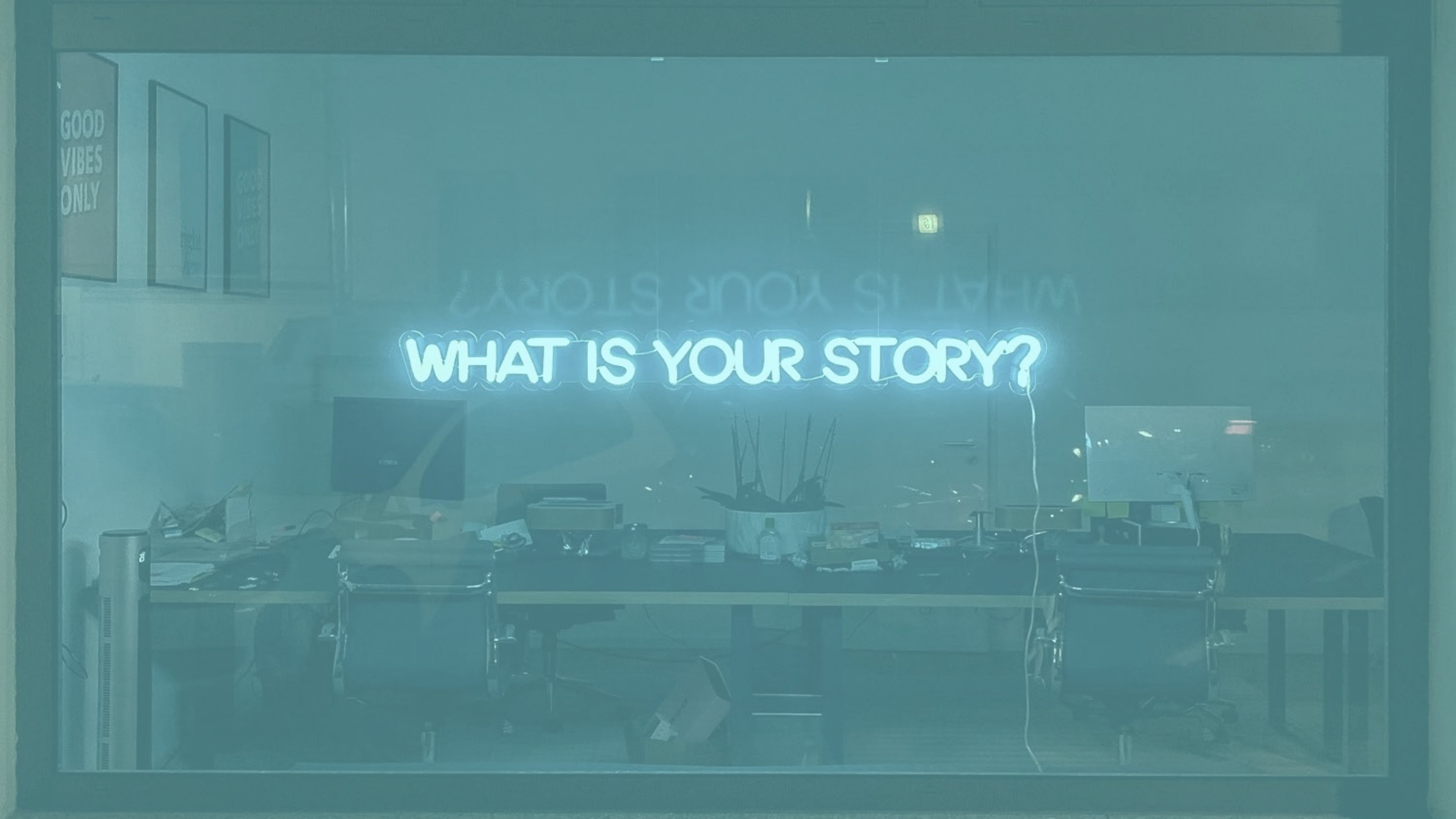
Does this sound familiar?

About ABC Financial:
We are more than a team of advisors—
we are your strategic partners.
We are 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...

Flip the Script

Your prospect's intention is not to learn about you … It's to learn about what you can do for them.

When most other advisors talk about themselves, you can talk to your ideal clients.


GOOD
VIBES
ONLY
WHAT IS YOUR STORY?

The "Upside-Down" About Page

1. Identity bullets: Questions and problems 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

EXAMPLE

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

EXAMPLE

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."

Ready to get started?

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

Schedule a Call

Call to action

EXAMPLE

TOPTURN CAPITAL

About Services Blog Schedule A Call Business Assessment

ABOUT

What Topturn Is All About

Do Any Of These Sound Familiar?

- 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

Identity bullets

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

Not sure where to start?
Talk to your clients!

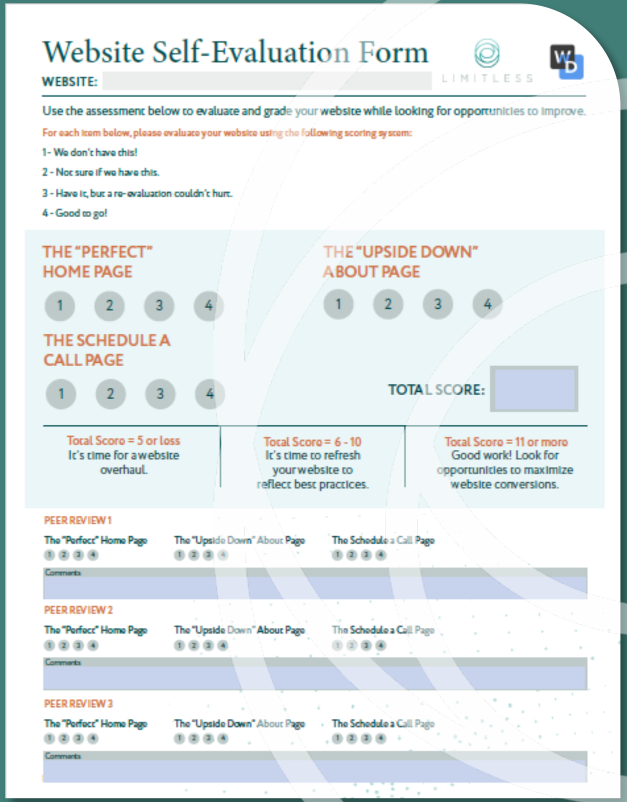
What questions do you get when clients first meet you? What common questions/concerns come up as you serve them?

The "Upside Down" About Page Summary

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

ACTION STEPS

1. Review website-evaluation worksheet
2. Grade yourself on scale of 1–4 based on the “Upside-Down” About Page section
3. Consider…
   - Identity bullets
   - Questions new clients ask you



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Comments

3

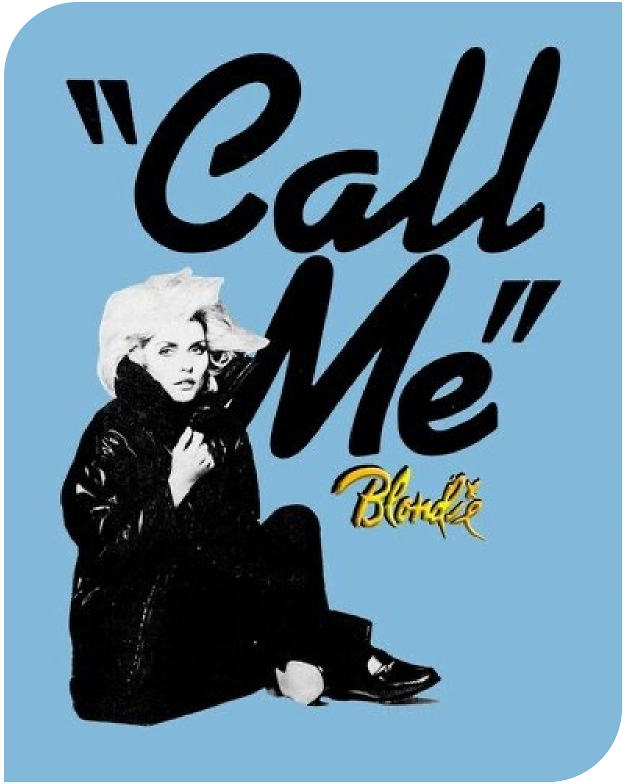
The "Schedule a Call" Page

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?

Webpage that helps you get qualified discovery calls. Encourages clients who are a great fit and discourages those who are not ready to sign up yet.

1. What it is : The result/intention)
2. Who it’s for: Three qualifiers
3. How it works: 1–3 steps



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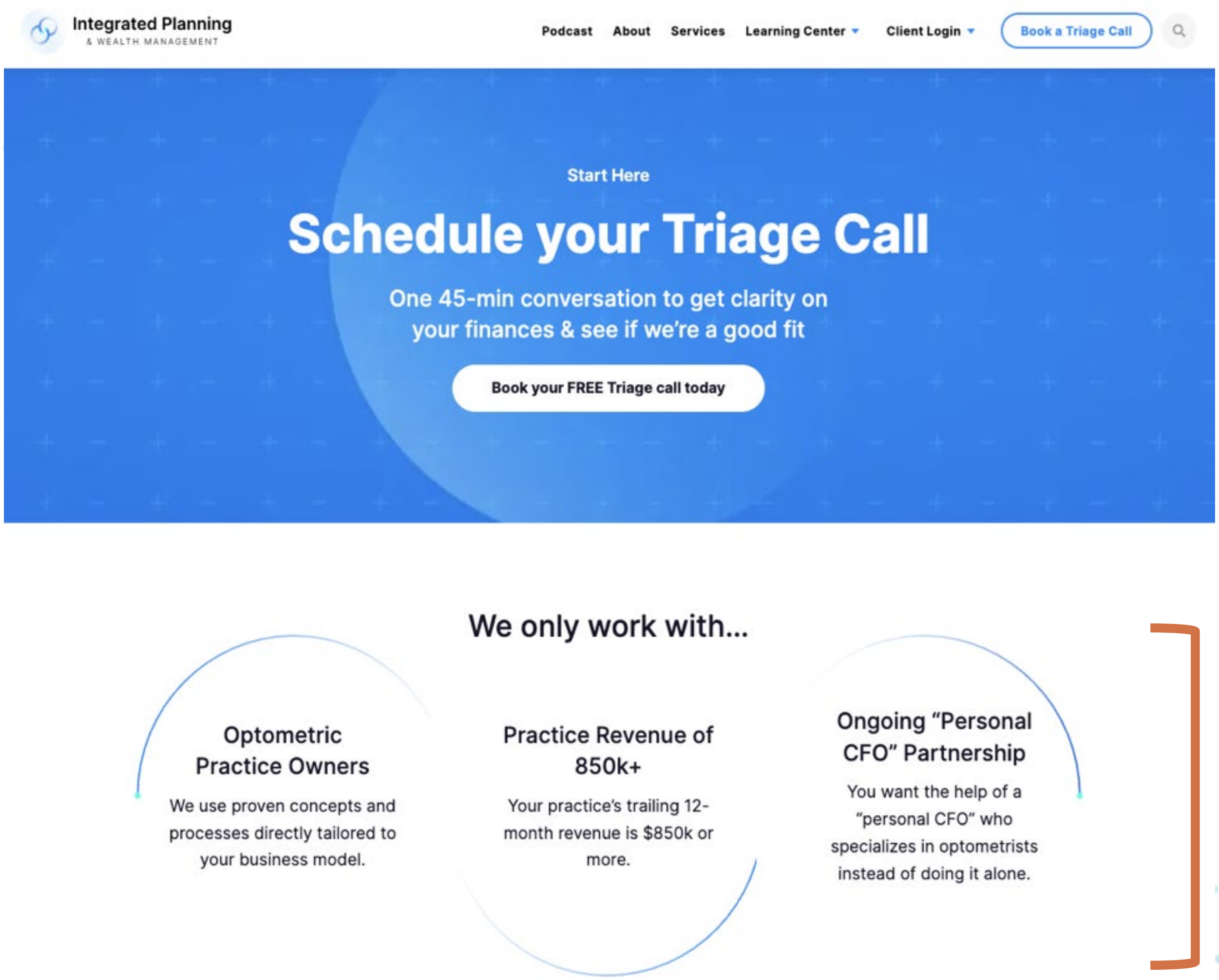


What it is (intention)

Who it's for (3 qualifiers)

EXAMPLE

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.

How it works

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.

Schedule a 45-Minute Triage Call

Schedule a Call

The 3 Qualifiers

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

We work best with...

Optometric Practice Owners

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

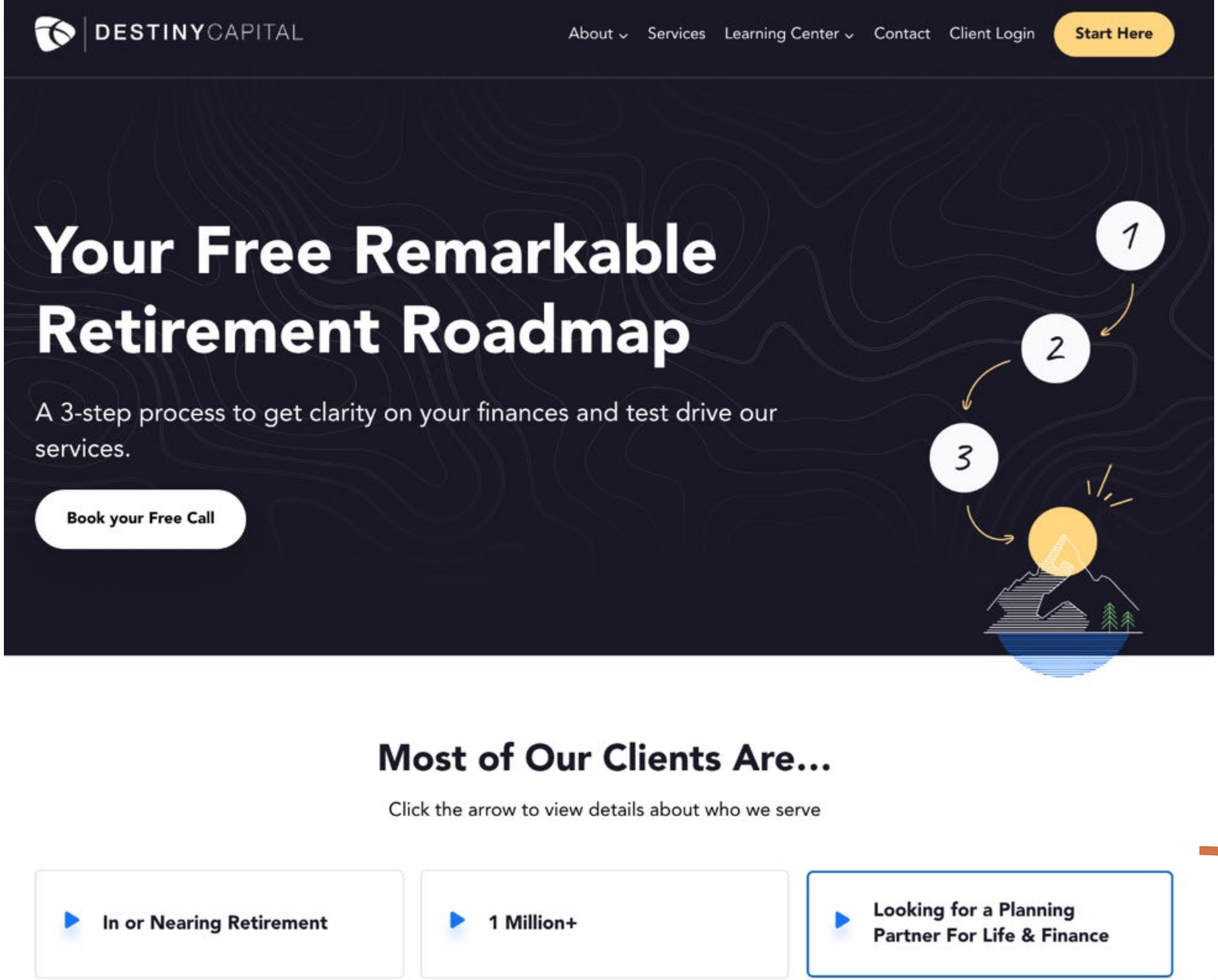
Practice Revenue of 850k+

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.

EXAMPLE



What is is (intention)

Who it's for (3 qualifiers)

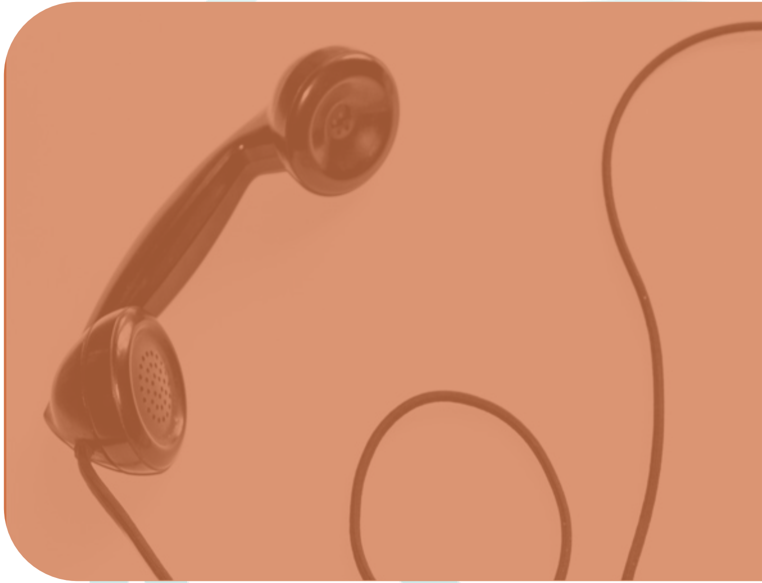
"Triage calls are down 30% but we're still signing the same number of clients per month. It's worked perfectly."

ADAM CMEJLA CFP®

Integrated Planning and Wealth Management

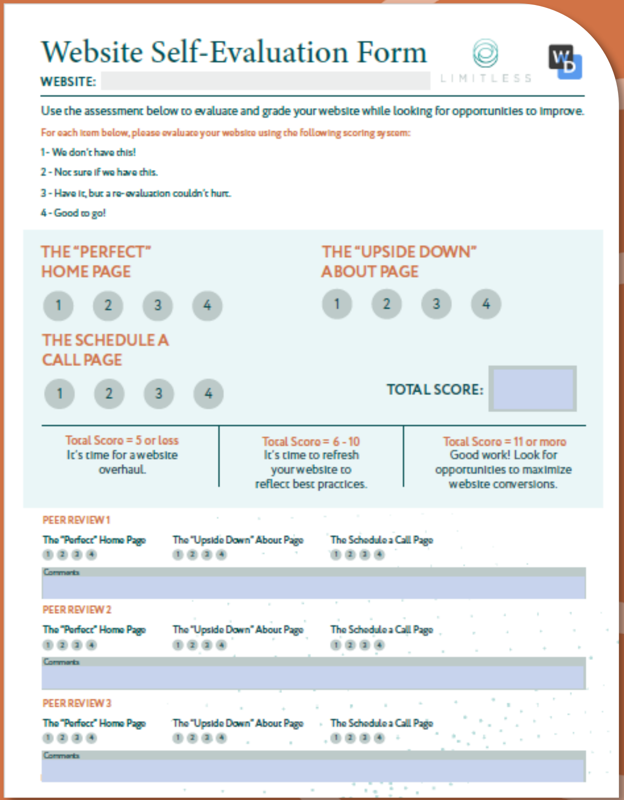
The "Schedule a Call" Page Summary

- 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

1. Review website evaluation worksheet
2. Grade yourself on scale of 1-4 based on the "Schedule a Call" Page section
3. Consider…
   - The result/intention
   - Three qualifiers
   - 1-3 steps



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LIMITLESS

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Comments

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Comments

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

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

WEBSITE AUDITS Q&A


WEBSITE
EVALUATIONS

LEARN MORE

- Optimal Design of Advisor Websites to Generate Leads, Carl Richards & Michael Kitces
- 5 Design Tips to Boost Trust & Credibility on Your Advisor Website, by Michael Kitces

ADAPT & APPLY

- Complete your Ideal Client Profile
- Review Websites that Work Resource List for additional information on website key elements
- Use Website Evaluation Form to assess your current site
- Review Limitless coaches' website samples

TAKE ACTION

- Focus on UX and Digital Brand
- Identify conversion objectives
- Create a high-quality design
- Build for performance
- Follow Web Accessibility guidelines
- Retain trusted partners