

2 Ways I Improved My Advisor Website SEO (And How You Can, Too)

 kitces.com/blog/best-advisor-website-search-engine-optimization-seo-tips-meta-tags-descriptions-ux-linking

25 January 2021

Executive Summary

The financial advisor website has become the equivalent of a financial advisor's digital storefront, a staple of attracting clients and growing the business. By investing resources into designing attractive website pages and writing relevant articles to include on their website, advisors aim to give clients a sense of the firm's scope of services and breadth of knowledge. However, a digital storefront isn't effective if no one ever walks by to see it in the first place... which in the internet era, means implementing a strategy to optimize how the advisor's website can be found by search engines and the prospective clients who may be searching there *for* a financial advisor!

In this guest post, Taylor Schulte – founder of Define Financial, an independent RIA based in San Diego, CA – discusses two primary strategies that he has implemented to optimize the content on his own firm's website to maximize its Search Engine Optimization (SEO). These tactics have helped improve his online visibility, grown organic search traffic by over 1,500% in three years, and, most notably for the business, generated an average of 15 high-net-worth leads per quarter, through his website, for his advisory business.

The first SEO strategy is to upgrade an advisory firm's descriptive meta tags on its website, which serve to provide search engines with important information about how web pages should be displayed in search results (in the hopes of persuading more prospective clients to click through). Accordingly, it is important to conduct keyword research and select relevant keywords that identify unique features about the firm (e.g., who the advisors are, what they do, who their ideal clients are, and where they are located) that help increase the probability of the website being ranked highly as a search result for someone explicitly looking for what the firm has to offer. Fortunately, there are many SEO analytics tools and plugins (e.g., Ahrefs, Yoast, Google Analytics, and Ubersuggest) designed to help advisors easily conduct keyword research for their websites (as well as help advisors conduct regular website audits to maintain and improve SEO results, which should be an ongoing process).

The second advisor SEO strategy is to improve the internal and external links tying to the financial advisor's website, effectively improving the quality and value of a website's content (and its perceived credibility in the eyes of search engines). The two types of links to improve for SEO purposes are: 1) internal links that send a visitor to a new page on the *same* website (e.g., a link on a site's home page that sends a visitor to the "Meet the Team" page), which help visitors easily find site

features and relevant content; and 2) external links that send visitors to a new page *outside* the website (e.g., a link in a blog post on one website that sends a visitor to an unrelated vendor website that sells a product mentioned in the blog), which offer visitors a useful (and time-saving) resource to delve deeper into topics of interest (and make the advisor's website seen as a valuable source of information). Fortunately, SEO plugin tools again typically have features to help advisors assess opportunities to add both internal and external links (and also to minimize the potential number of broken or orphan links on the website).

Another way for advisors to improve website SEO is to take steps to increase backlinks, which are links on *other* websites that point back to the advisor's website. Three ways to increase backlinks include: 1) optimizing the firm's or advisor's profile pages on industry network or organization websites (e.g., industry-wide organizations that offer "Find An Advisor" services); 2) offering to write guest posts for websites or blogs that are read by the advisor's target demographic; and 3) responding to media queries (and including your website link with the submissions) through organizations such as XY Planning Network, the Financial Planning Association, or Help A Reporter Out (HARO), where the reporter hopefully links back to the advisor's website as part of the source attribution for the quote.

Ultimately, the key point is that there are simple steps that financial advisors can take to improve their website's SEO. By conducting some basic research to select effective keywords for meta tags, optimizing and auditing their internal and external links on a regular basis, and connecting with other organizations and websites to increase backlinks, advisors can improve their website's SEO results, making it easier for their ideal visitors to find their website, and potentially even to become new clients!

Search Engine Optimization (SEO) is an overlooked and underestimated marketing strategy. In fact, the [latest Kitces Research study on advisor marketing](#) found that SEO had the lowest (i.e., most favorable) client acquisition cost of any marketing strategy, and was the [second most efficient in terms of marketing Return On Investment](#) short of the ever-most-popular client referrals. But SEO can also be intimidating, especially for advisors who lack technology know-how or digital marketing expertise.

Yet while improving your advisor website's SEO might feel like a daunting task, keeping it simple and following a few basic principles is often all that's needed to see positive results.

In this article, I share two primary strategies I've implemented to optimize the content on my own firm's website for SEO. These simple tactics have helped improve our online visibility, grow our organic search traffic by over 1,500% in three years, and most importantly for the business, generated an average of 15 high-net-worth web leads per quarter.

If you're a financial advisor who wants to improve your website SEO, follow along to learn what I did, how I did it, see the before and after, and learn exactly what you need to do to take action for your own advisor website.

What is Search Engine Optimization (SEO)?

In the last 30 days, 5,340 people visited my financial planning firm's website as a result of organic search (i.e., where my website came up as the result via a search engine like Google or Bing). I didn't lure them in with a paid advertisement (that would be *paid* search, not *organic* search), or by sharing a link to my website on social media. These people found my site organically by deliberately searching the web for information... and finding my advisor website as the answer.

Organic search traffic is a direct result of Search Engine Optimization (SEO). But what exactly *is* SEO?

Google defines SEO as "the process of making your site better for search engines."

Moz, a widely read SEO blog, takes it a step further by saying, "[SEO is] the practice of increasing the *quantity* and *quality* of traffic to your website through organic search engine results."

A search engine's job is to provide high-quality, relevant search results to its users. In order for a search engine to know what website (or particular webpage on your site) should appear in the results, it needs to have some basic information. In other words, a website needs to be "optimized" appropriately, so search engines can understand what it's about, and thus know when and where to put it in front of users.

The good news is that Google and other search engines tell us exactly what they need and want from us. Despite this, most website owners, unfortunately, fail to take action, resulting in little to no organic traffic and countless missed opportunities for growth. Happily, I'm no longer one of those website owners!

Maintaining Simple SEO Strategies Can Increase Advisor Website Visits Significantly Over Time

In January 2018, organic search traffic (i.e., the number of people who visited my website as a result of using a search engine) for my website lagged at around 280 visits per month. After spending time learning the basics of SEO and updating my website to give search engines better information, I immediately began to see results. By the end of 2018, monthly organic search traffic had more than doubled.



In addition to optimizing new content as it was being published to our website (and being patient!), I regularly monitored our results and put additional time and resources into the things that were working best. In three years, without any expert help or advanced tactics, I saw organic search traffic grow by more than 1,500%.



Increasing organic search traffic was just one benefit of working on my website's SEO. By implementing some simple SEO strategies described below, my website's online visibility improved, and, as a result, I now generate an average of 15 high-net-worth web leads per quarter.

Advisor SEO Strategy #1: Add Descriptive Meta Tags To Tell Search Engines Who You Are And What You Do

When you save a file to your computer, you give it a name and a home (i.e., a folder) so you can easily find it in the future.

Like computer files, websites and webpages need descriptive names so search engines know what they are, who they are for, and when they might be appropriate to show in search results.

Enter meta tags.

“Meta tags are snippets of code that tell search engines important information about your web page, such as how they should display it in search results,” according to [Ahrefs](#), an online SEO tool.

While there are a lot of different types of meta tags, we are going to focus on the two most important ones, *meta titles* and *meta descriptions*.

Advisor Website Meta Titles

All websites and webpages have meta titles. If you don't provide one, a default will be given – and that's a problem. The default may or may not be relevant to who you are and what's on your website. It also might not include all the information search engines need to add you to search results.

For example, let's take a look at my friend Matthew Jarvis, founder of [Jarvis Financial](#) in Seattle, WA. “Jarvis Financial” is the meta title for his firm, as it appears in Google search results:



Put yourself in Google's shoes for a moment. If the only information you had on this website was “Jarvis Financial,” would you be able to explain what Matthew does, who he does it for, and where he operates? For all we know, Jarvis Financial could be a bank in Nevada or an accounting firm in Europe.

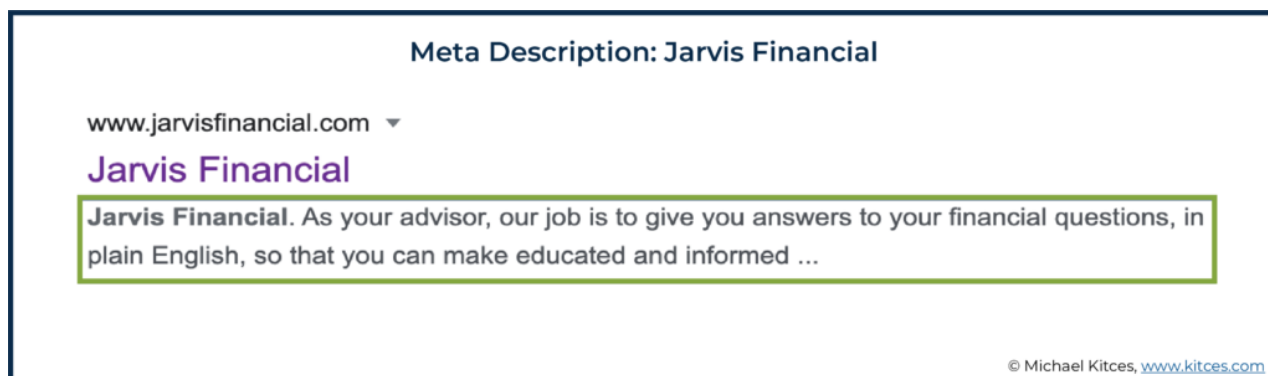
In addition to meta titles helping search engines, they also give web users insight into different search results and why they're relevant to their queries. As the meta title is literally the main label for the page that is displayed at the top of the search result itself.

Not surprisingly, then, Google says meta titles are the primary piece of information users rely on to decide which result to click on. For that reason, it's important to write your own meta title, making it as descriptive as possible.

Advisor Website Meta Descriptions

Similar to meta titles, every website and webpage has a meta description. If you fail to write one, a default will be displayed. In some cases, it can be left blank.

In the example below, Google took the first 25-words from the Jarvis Financial homepage and used that as the meta description.



Meta Description: Jarvis Financial

www.jarvisfinancial.com ▾

Jarvis Financial

Jarvis Financial. As your advisor, our job is to give you answers to your financial questions, in plain English, so that you can make educated and informed ...

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While this description includes the word “advisor” and provides a little more information about what they do, a search engine or web user would still be left with a lot of questions about this company. Does Jarvis Financial serve clients in a particular area? What services does it provide as an advisor? Does Jarvis Financial provide hourly financial advice to answer your financial questions one engagement at a time, or work as a comprehensive planner who responds to those financial questions on an ongoing basis as part of a holistic relationship?

“A meta description should generally inform and interest users with a short, relevant summary of what a particular page is about,” according to Google. The meta description is “like a pitch that convinces the user that the page is exactly what they’re looking for.”

How Keyword Research Can Help To Create Effective Meta Tags

In order to know how to properly write your meta title and description, you need to identify keywords that accurately describe your firm and its services (i.e., the words that consumers might actually be using to try to find *your* firm in particular if they were trying to find an advisor like you to hire).

To help determine the relevant search keywords for your advisory firm, I suggest answering these three core questions:

1. What is your professional title?
2. Where is your firm located?
3. What services do you provide?
4. To whom are your services provided?

For example, I’m a **financial planner** in **San Diego**, providing **investment** management, **tax** planning, and **retirement** solutions to people over age 50.

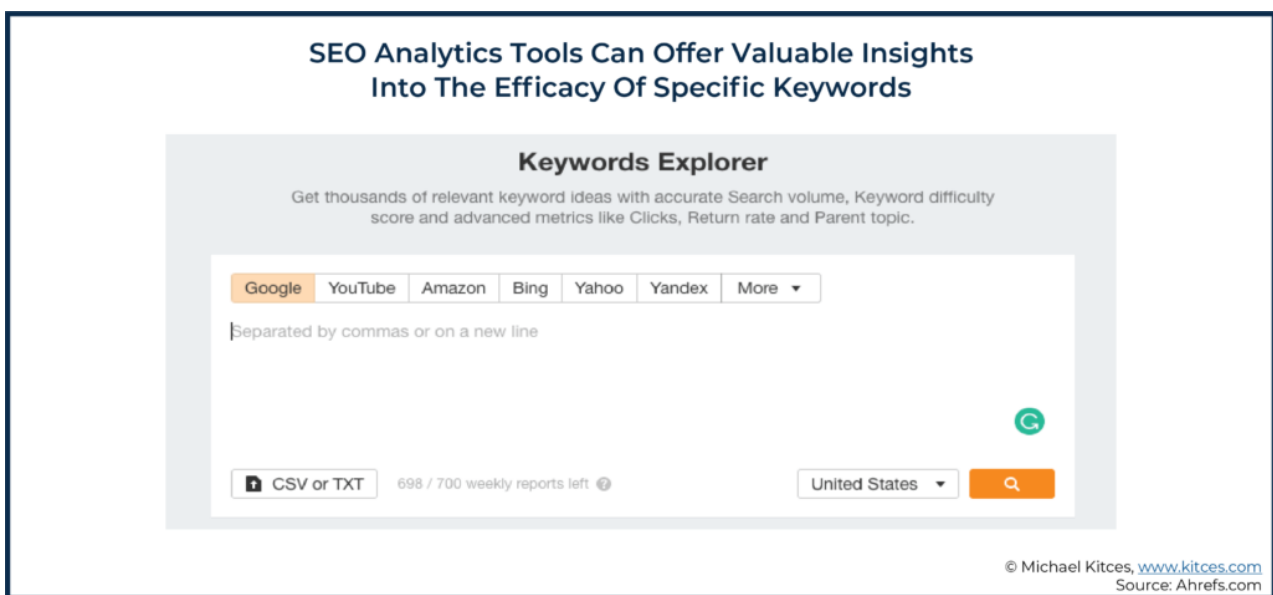
After you identify 5-10 keywords, the next step is to determine which ones are being used most frequently in search queries. This information is formally known as “keyword search volume” and reveals the number of searches your target keyword receives **per month**.



Nerd Note:

I use and pay for a robust SEO analytics tool called [Ahrefs](#) for keyword research, but you can also use [Google Analytics](#) or [Ubersuggest](#), which are free and provide similar information. In addition to a friendlier user interface, I simply favor Ahrefs because of the additional ‘nerdy’ data they provide. For example, it’s the only keyword research tool to show the number of clicks on search results.

To determine a keyword’s search volume, head over to the SEO analytics tool of your choice and type your word or phrase into the designated search box. For example, Ahrefs provides a “Keywords Explorer” tool that lets you enter your keywords of choice and will return analytics that give insight into the utility of using those keywords across multiple platforms, such as Google, Amazon, Yahoo, etc.



As an example, my office is located in Carmel Valley (in the greater San Diego area), but web users might be using Del Mar (another nearby town) or San Diego in their searches instead.

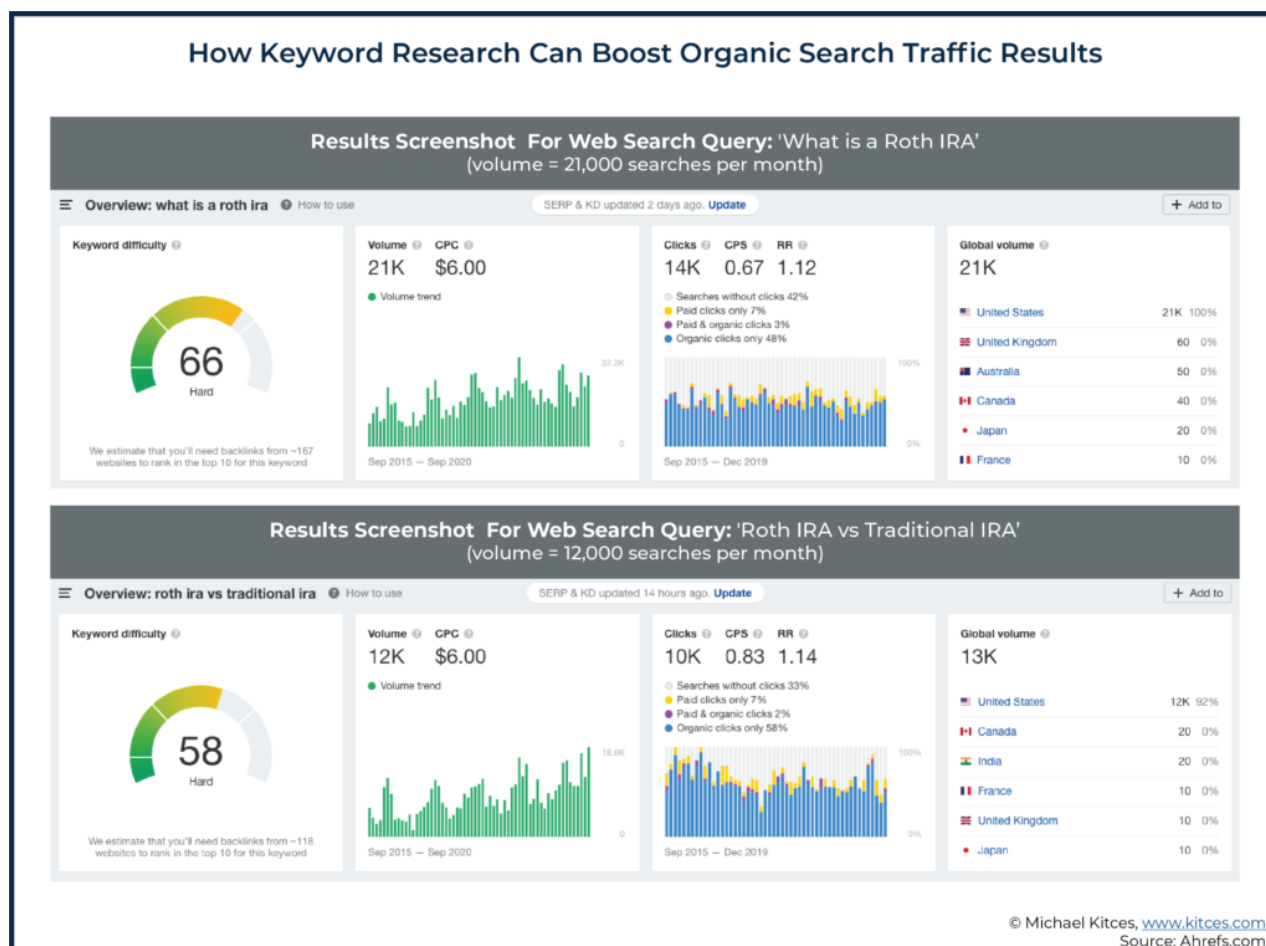
Also, unlike doctors and attorneys, financial advisors have an array of professional titles to choose from. Financial Planner, Financial Advisor, Wealth Manager, Financial Consultant, Certified Financial Planner Professional, Investment Advisor...the list goes on.

To highlight why keyword research is so important to meta tags, let’s compare two very similar search queries: “financial advisor San Diego” versus “financial planner San Diego.”

On average, according to Ahrefs analytic data, the term “financial advisor San Diego” is searched 100 times per month. On the other hand, “financial planner San Diego” has an average of 250 searches per month. Some very quick and simple keyword research, which signals that it would be better to highlight myself as a San Diego financial *planner*

instead of a San Diego financial *advisor*, can result in significantly more organic search traffic by aligning myself to the version that I now know is searched more frequently in the first place.

The concept of keyword research can also be applied to specific webpages or blog posts on your website. Are people using the word “stocks” or “equities” in their web searches? Are there more users searching “What is a Roth IRA” or “Roth IRA versus Traditional IRA”?



These subtle nuances might seem silly, but they are incredibly important if you want to put yourself in the best position to be found on the internet when Google is trying to parse billions of websites and match them to billions of searches... and as a result, often gets *very* specific in trying to make a match (which is what creates the opportunity to optimize your website to match those best-fitting results!).

How I Improved Meta Tags to Boost Our Advisor Website SEO

Prior to understanding what meta tags are and why they're important, I was solely focused on the quality of our content. I assumed that clear, high-quality content on our website would make up for the lack of SEO optimization strategies.

While this is not a bad approach (quality *is* important!), I was missing out on low-hanging fruit. Google was asking me for descriptive meta titles and descriptions to figure out what my website was about and whether it should send anyone *to* read all that quality content I

was producing... and I was ignoring the requests.

Similar to Jarvis Financial, our meta title was simply the name of our firm, and the description was chosen by the search engines. Which meant we had great content, but Google wasn't sending anyone to our website to discover it!

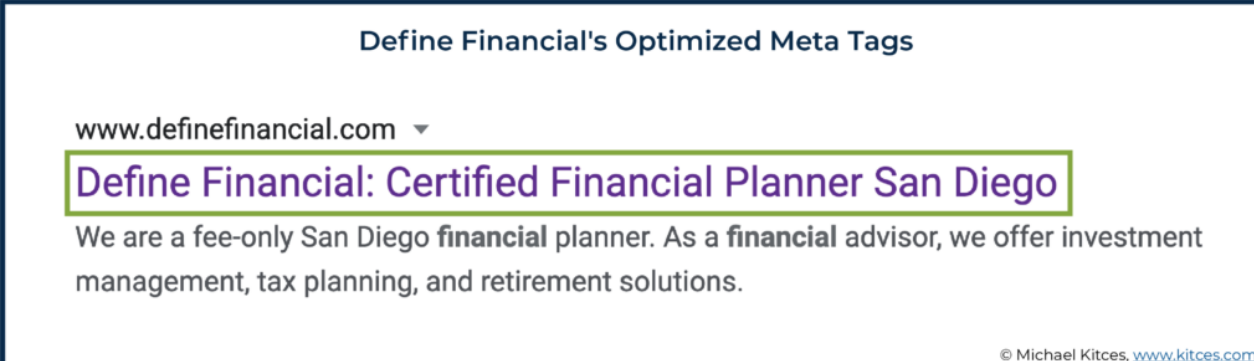
Yoast SEO & Ahrefs: Plugins That Can Help Optimize Meta Tags

The first step I took to fix our meta tags was to adopt and install the [Yoast SEO](#) plugin (if you're not tech-savvy, this should be a very simple process for your website designer/host). And not only is Yoast an incredibly helpful tool, but it's also free!

When you first launch Yoast, it takes you through a guided process to update important information about your website, including meta titles and descriptions. It also alerts you if your meta tags exceed the recommended character count (as Google only has so much room to fit a label in the limited space of the search results... if the meta tags are too long, they'll simply be truncated, which usually isn't ideal!).

While nobody can control exactly what and how Google displays your information in the search results – sometimes, Google will pull information from within your page if it thinks that's more relevant to show the person doing the search – keeping your meta tags short and sweet has proven to be a smart approach. According to [Yoast](#), a good meta description should be 120 to 155 characters. As for titles, [Moz](#) says that if you keep them under 60 characters, you can expect about 90% of your titles to display properly.

Here is what my firm's meta title and description look like today on Google:



The screenshot shows a search result for "Define Financial's Optimized Meta Tags" on the website www.definefinancial.com. The meta title is "Define Financial: Certified Financial Planner San Diego" and the meta description is "We are a fee-only San Diego financial planner. As a financial advisor, we offer investment management, tax planning, and retirement solutions." The meta title is highlighted with a green box. The footer of the page includes the copyright information: © Michael Kitces, www.kitces.com.

It's important to note that it can take search engines weeks, if not months, to crawl your website and publish these updates. So, don't panic if you update your meta tags and don't immediately see the changes reflected in a Google search. Notably, there are ways to ask [Google to recrawl your website](#), though the process can still take up to a few weeks to kick in.

In addition to adopting Yoast, I also signed up with [Ahrefs](#). One of the benefits of purchasing a tool like Ahrefs instead of using a free option like Google Analytics is the ability to run a comprehensive website audit. A proper audit helps identify issues with your website SEO and provides a solution to fix them (especially important if you already have an existing website that you need to go back and improve).

While most people view Google Analytics as the gold standard for free web analytics, other good options *do* exist. In a comparison done by software review website [G2.com](#), many users also rated other tools very highly, such as [Ahrefs](#), [Semrush](#), and [SE Ranking](#), across multiple categories, including ease of use, ease of setup, ease of admin, and quality of support.

With Ahrefs as my own chosen tool to provide data and recommendations, I ran a site audit to identify pages and blog posts that were missing important meta tags. With the information that Ahrefs provided, guiding me where I needed to go, I visited those pages on my website in need of attention and used the guided prompts from Yoast, which help me to actually *take* action and implement the recommendations to quickly fix the issues.

Since we actively write blog posts on the website, I also use Ahrefs to identify blog posts that are climbing in the search rankings. When I see a post gaining traction, it prompts me to put more time and energy into additional SEO tactics to help keep the momentum going on a particular topic.

The simplest and most common tactic is to ask myself, “How can I make this article even *more* valuable? What else can I add to help address common questions people have about this topic?”

As part of this exercise, I’ll also research what articles by others on the same topic have included that I left out. If my blog post is simply more valuable than everything else on the internet, Google will likely reward me.

Like a financial plan, websites are living and breathing entities that require ongoing attention. Not only does Google roll out changes to how it operates, but content management systems like WordPress and plugins like Yoast regularly release updates that can cause new issues to arise. For that reason, I regularly run a website audit with Ahrefs every quarter.

Action Items For SEO Strategy #1: Adding Descriptive Meta Tags To Improve Search Results

Increasing your organic search traffic takes effort on the back end. You have to supply search engines with the right information so they will put your content in front of the appropriate audience. This is done by identifying descriptive keywords that connect your content to search queries, following best practices for meta tags, conducting regular site audits, and adopting tools like Yoast SEO and Ahrefs to boost your efforts.

Ideally, site audits should be done once per year, at a minimum. I run them quarterly because our website is wildly important to our business and I want to stay ahead of any potential issues that might be hindering our online performance. While there is no harm in running frequent site audits, the frequency that you choose should be based on what works for *your* firm, and shouldn’t become a distraction from your day-to-day work.

If you have already nailed down these basics, you can consider making improvements to your existing meta tags. For example, putting your target keyword at the beginning of your meta title and description is known to further optimize that page or post for SEO.

Here's an example of one of our blog posts that consistently ranks on page one of Google and uses this target keyword strategy:

Using Target Keywords In Meta Titles And Descriptions

www.definefinancial.com › blog › investment-policy-st... ▼

Investment Policy Statement (IPS) Defined + Free Sample

Jump to **The Investment Policy Statement (IPS)** is Critical to **Financial ...** – **The Investment Policy Statement (IPS)** is a document that dictates how you invest your money. ... The **IPS** tells them how, when, and where to invest so you can reach your financial goals.

[Information Included on ...](#) · [Do Individual Investors ...](#)

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You can also add modifiers or superlatives that are often included by search users. Examples that tend to improve search results include things like the year, or terms like “best”, “checklist”, and the current year (e.g., “2021”). These modifiers can influence users to click on your page over someone else’s, which boosts your website’s SEO and improves your site’s Click-Through Rate (CTR), which is the ratio of how many users actually click on a link to get to your page (i.e., they didn’t just see your page as a result in a Google search, they actually chose *yours* as the one to click on!).

Here’s a recent example of what helped this blog post go from zero organic traffic to page one of Google in 30 days last year:

How Title Modifiers (Like Adding The Year) Optimize Click-Through Rate

www.definefinancial.com › blog › best-questions-to-as... ▼

The 7 Best Questions to Ask a Financial Advisor in 2021

Jan 4, 2021 – “The average experienced lead advisor has 96 clients”, according to financial services guru Michael Kitces. 3. **What is my total cost to work with ...**

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In summary, providing search engines with basic information using carefully selected keywords that describe your website and content is an easy first step towards improving your SEO. And you don’t even need to hire an expert to do it!

Action Items for SEO Strategy #1: Adding Descriptive Meta Tags To Improve Search Results

- Choose SEO research and audit tools (e.g., Yoast SEO, Ahrefs, Google Analytics) to help you optimize your website
- Identify descriptive keywords to use in meta tags across your site
- Conduct regular site audits to maintain and improve the SEO results produced by your site's meta tags

SEO Strategy #2: Improve Your Link Strategy

There are two types of hyperlinks: internal and external.

An internal hyperlink, when clicked, sends you to a new page on the same website. For example, if you [click this internal hyperlink to Michael Kitces' post on the true costs of acquiring a client](#), you'll be reading a new article but will remain on this website. Thus, it is an "internal link" of the Kitces website.

On the other hand, clicking an external hyperlink will send you to a page on an entirely different website domain. Clicking out from Kitces.com to [my Define Financial website](#) would be an "external link" from Kitces.

By following some basic principles as outlined below, the good hyperlinking strategy can both improve the quality of your content and add value for your web visitors, two things known to boost SEO.

Similarly, increasing the number of links to your website that are included on other websites (i.e., external links from *their* website to yours, also known as backlinks because they come *back* to your website) will signal to Google that your content is valuable enough to put in front of search users.

Hyperlinking Challenges And Misconceptions – It's 'OK' To Send Visitors Away

Hyperlinks are about the user, not me. But it took me a while to understand that. For years, I thought that if someone landed on my website, I should do everything I could to keep them there. Given that train of thought, I refrained from including external links that would send potential clients away to third-party articles or resources. I was selfishly putting my interests ahead of the user, and that isn't a prudent approach to marketing.

Eventually, I learned that adding a link for another website's page to my own site, even if it takes a web visitor *away* from my website, adds value for the visitor. Because users who use those external links to leave my website will remember that my site saved them time looking for a credible resource on a particular word or concept. Furthermore, good external links to vetted sites can help to establish my own website as a valuable and reliable tool that helps the user find the information useful to them. This, in turn, creates a better web browsing experience, which is a positive SEO ranking signal.

In addition to misunderstanding the importance of links, I failed to adopt a plan and a repeatable process for adopting this strategy. “A goal without a plan is just a wish” is what we would tell our clients, and the same can be said here.

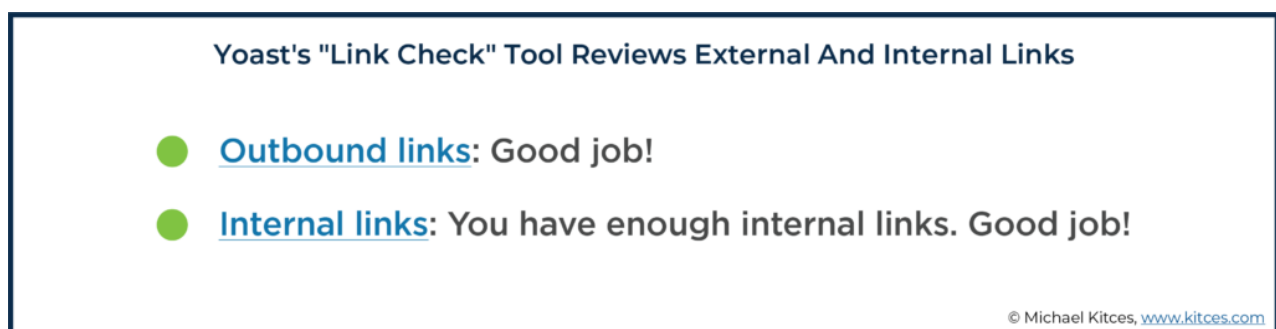
In order for our marketing to be successful, we need documented processes to promote consistency and ensure our marketing activities align with our goals.

Using Technology To Improve Our SEO Hyperlinking Strategy

In SEO Strategy #1, I shared how Yoast SEO helped me fix my meta tags. This free website plugin came to the rescue again when it came time to improve my hyperlinking strategy, and it was the first resource I used. Specifically, Yoast’s “Link Check” and “Text Link Counter” tools were the most helpful features.

Yoast SEO’s Link Check

The “Link Check” tool serves as a simple reminder to ensure you include at least one internal link and one external link per page or post. If you nail down that basic task, you’ll be rewarded by Yoast with a message like this:



On your homepage, the type and quantity of links are optional. Personally, I keep the number of hyperlinks on my homepage to a minimum so I can keep web visitors focused on taking action. I take the same approach with select internal pages where I want to limit distractions, such as our [Free Retirement Checkup](#) landing page.

For other pages and, more specifically, blog posts, the number of internal and external links depends on the content. As Yoast wisely recommends, “add a link when the content it links to is of interest to the reader.” If you’re not certain where to add an internal or external link, try to read through the content as though you were the visitor to your own website and think “in what sections would I *want* to click on something to get more information about this?” And then link accordingly, either to another page on your website (an internal link) or to some other resource on another website (an external link).

My rule of thumb is to include three to five of each link type (i.e., external and internal) on pages and posts I’m optimizing for SEO. From there, I use Yoast’s “Text Link Counter” to review our site structure and determine if additional links are needed.

Yoast SEO’s Text Link Counter

There are two main things to know about proper [site structure](#):

1. It improves user navigation; and
2. It helps search engines crawl your website to determine what content to show in the search results.

The best way to improve site structure is by improving the use of internal links, and that's exactly what Yoast's Text Link Counter helped me with.

This built-in feature counts the number of internal links included in a specific post or page that refer to other pages on your *own* website. It also shows the internal links included on other pages of your website that refer back to the specific post or page being analyzed.

Two things that Yoast points out (which improve the website's crawlability and also tends to increase dwell time) through this link-counting exercise include:

- Other pages or posts on my website that link to the page/post I'm working on and those that may be 'orphaned' (i.e., pages on a website that aren't linked from any other page) that can be fixed.
- Potential internal links that can be made between pages and/or posts on my website that may have related content. For example, Yoast might suggest that a blog post on long-term care insurance include an internal link to another blog post on health insurance in retirement, given the content is related. If someone is reading my post on long-term care, it's fair to say they would likely also find value in my post on health insurance.

With a simple strategy in place for managing hyperlinks on my website and an improved site structure, the next step was to improve our backlink profile.

The Importance Of Backlinks And How To Earn Them

When another website links to a page on your website, you become the recipient of an external link. In the SEO world, this is referred to as a backlink. In fact, a survey conducted by backlinko.com found that the number one search result on Google has almost 4x more backlinks than positions two through ten.

"Backlinks are especially valuable for SEO because they represent a vote of confidence from one site to another," says [Moz](#).

It's easy to understand the importance of backlinks... but earning them is hard. As a starting point for improving your backlink profile – which impacts how likely other sites will include backlinks to your site – consider using these three simple strategies I still use today:

1. **Optimize organization profile pages.** Many of the industry networks and organizations that advisors belong to permit links (i.e., backlinks) from the profile pages on their websites (e.g., their “Find An Advisor” and similar tools) back to the advisor’s own website. For example, the Fee Only Network website offers a directory of advisors who can upload their own information into a [directory page that points back to their own website and other relevant pages](#) within the website. Along with adding a backlink from your profile to your firm’s homepage, consider adding links to internal pages within your website that would be fitting and valuable to the reader (e.g., your Fees page or your Services page). You can also consider adding a link to another arm of your business, like a podcast or blog.
2. **Offer to write a guest post.** This article you’re reading right now is an example of a guest post. You can offer to do something similar for websites and blogs that are fitting for your target demographic. More often than not, the website will gladly provide a [backlink to your website\(s\)](#) to help their readers easily learn more about you. Which also gives you a backlink that boosts your SEO (which means you aren’t just found by those who read the Guest Post but also become more searchable for *anyone* using Google or other search engines in the future!).
3. **Ask the media.** Many of us respond to media queries through organizations like [XY Planning Network](#), [Financial Planning Association](#), and [Help a Reporter Out \(HARO\)](#). When you submit your response, include your name, title, and a hyperlink to your firm’s homepage. Additionally, if you have a blog post that might add additional value to your response, consider adding a link to it. While many media outlets will remove the links when they publish your contribution, every now and then they make the final cut. Here’s a recent example of a media query I responded to where I included links in my response:

Hi Cristina,

Thank you for including me in the last story. Here is a comment for your consideration:

One of the biggest mistakes is making a change to your investments without updating your financial plan and [Investment Policy Statement \(IPS\)](#). This is akin to taking a new prescription, or changing your dosage, without first consulting your doctor and documenting the change. Your investments shouldn’t change unless your policy statement changes. And that policy statement shouldn’t change unless your financial plan changes. While taking quick action might seem prudent in a downturn or recession, the long-term impact can often be damaging and, in some cases, irrecoverable.

-- Taylor Schulte, CFP®, founder of [Define Financial](#)

The Results Of An Improved SEO Linking Strategy

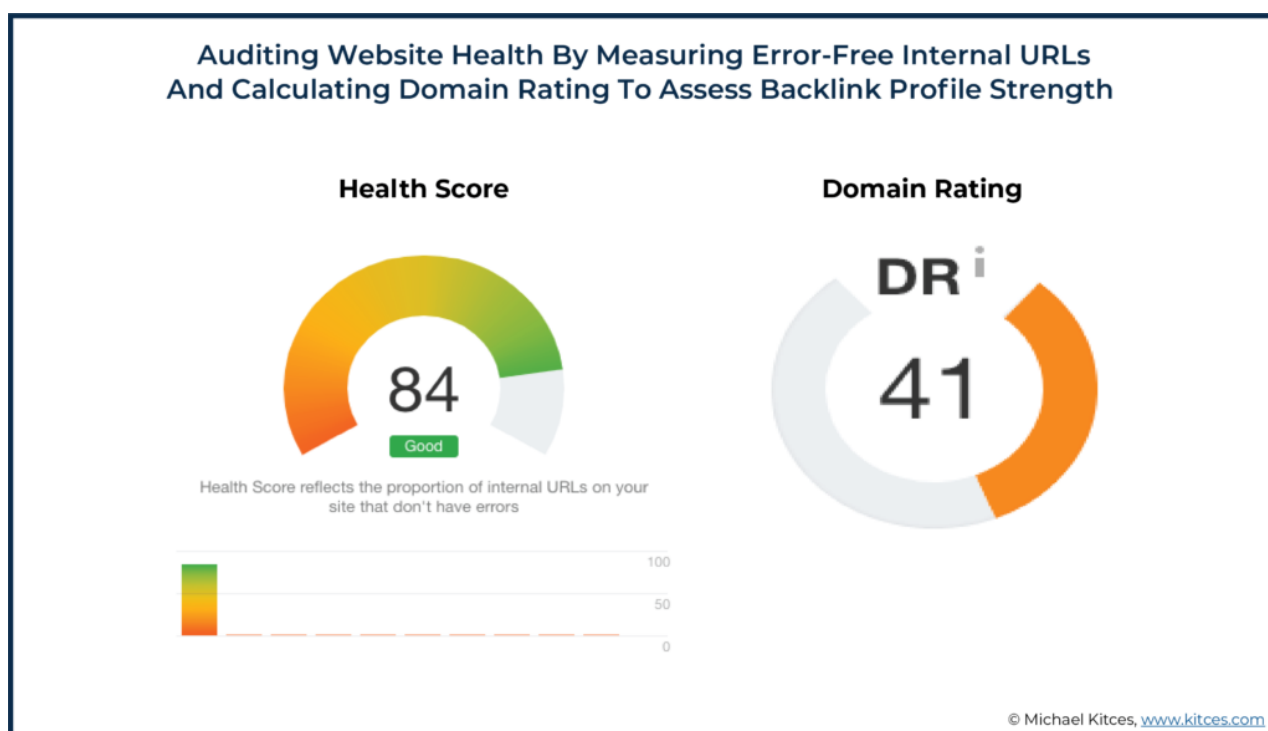
Improving our link strategy was not an overnight process. It took – and still takes – a lot of time, effort, and patience to see results.

To measure our progress, I monitor two important metrics provided by Ahrefs: Domain Rating and Health Score

Domain Rating is measured on a logarithmic scale from 0 to 100 and shows the strength of our website's total backlink profile. In other words, the more high-quality backlinks we earn, the higher our website is rated.

Health Score is calculated during a site audit and reflects the percentage of pages on our website that don't contain errors. Common issues impacting Health Score include meta tags missing, orphan pages, and slow page load speeds, all of which are fairly simple to address.

By staying consistent and following the basic strategies outlined in this article, my firm website has achieved a Domain Rating (DR) of 41 and a Health Score of 84.



These positive results signal to search engines that we are credible, reliable, and provide a good web browsing experience. This has led Google and others to include more of our content in their search results, contributing to increased organic web traffic.

Action Items For SEO Strategy #2

Nailing down the basics of hyperlinks will make your content more valuable and improve user experience, both of which boost website SEO.

However, before you jump ahead to the fun stuff (e.g., installing and subscribing to SEO tools, running a site audit, adding links to your organization profile pages, etc.), take time to document a process for improving your linking strategy.

For example, we created a workflow in our own CRM for publishing new articles to the blog. After the content receives final approval from our copy editor, the final step in the workflow is for our virtual assistant to optimize for SEO and publish. To maintain consistency and avoid missing basic optimization principles, we created a detailed checklist for her to follow, which includes steps that guide her through our hyperlinking strategy.

Workflow Checklist To Create New Blog Posts Ensures That A Consistent Hyperlinking Strategy Is Implemented

- Select appropriate author in WordPress.
- Ask author for target keyword(s) and add to "focus keyword" box in Yoast.
- Confirm when the post should be scheduled to publish.
- Confirm target keyword is in the title and permalink and confirm permalink is less than 5 words.
- Go to "Post After Title" at the bottom of the post to "Below Title Text" and include shorter, punchier version of the intro (just 1 - 3 sentences) to hook the reader.
- Use AIDA formula to write intro.
- Add Table of Contents below the intro.
- Edit the post to create more space, include shorter paragraphs (1 - 3 sentences), and find ways to remove filler words.
- Check headings. Should have at least three H2 headers in each post. Add H3 and H4 where appropriate and include target keyword(s).
- Double-check SEO title and slug.
- Confirm post contains a minimum of 3 - 5 relevant internal links and 3 - 5 relevant external links. Add additional links as needed to improve quality.
- Confirm meta title is accurate and receives "green light" from Yoast. Write meta description via Yoast, include target keyword(s), confirm "green light" result.
- Review Yoast SEO analysis for suggestions on how to further improve optimization.
- Review Yoast "Text Link Counter" results and add additional links if necessary.
- For WordPress "Category", confirm "Blog" is checked.
- Create featured image using branding elements pre-selected in Canva. Use prior images as inspiration but don't copy exact style and format.
- Save "compressed file" from Canva, include target keyword(s) in image title.
- Upload file to WordPress as the "featured image" and optimize. Alt text should be 1 - 3 words and image description needs to contain target keyword(s).
- Schedule the post.

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While you might not create a detailed workflow in your CRM as we have, the act of putting pen to paper will force you to be more thoughtful about your approach and create consistency.

With a process in place, you can now begin taking action by auditing your existing link strategy and website structure using Yoast. Follow the simple prompts to improve your existing pages and posts so you have a solid foundation to build on.

Finally, you can start pounding the pavement to begin earning more backlinks. Start by attacking the low hanging fruit first, like adding appropriate links as permitted to your organization profile pages (e.g., your advisor pages on CFP Board, FPA, NAPFA, XYPN, Fee Only Network, etc.). From there, determine the most fitting outreach strategy for building more backlinks and get to work.

While writing guest posts and networking with the media are common strategies, some advisors choose to outsource this step to a marketing or PR agency. If you do consider outsourcing, be very intentional about hiring someone who takes a responsible approach. Search engines are keenly aware of unethical practices that attempt to cheat the system. These practices can lead to short-term wins but come with negative, long-term consequences.

Action Items for SEO Strategy #2: Improve Your Link Strategy

- Decide on the strategy to improve the external and internal links included on your own site, and then document a process to implement that strategy
- Audit the internal and external links in place on your site (tools included in software programs like Yoast can help you do this)
- Work on increasing backlinks. Options to consider:
 - Link to organization profile pages
 - Submit guest posts to relevant blogs
 - Offer feedback to media reporters

SEO doesn't *need* to be complicated. In fact, keeping it simple and avoiding common pitfalls is the best approach for financial advisors who want to improve their online visibility. And while SEO won't necessarily generate results overnight, it's an efficient, cost-effective strategy that will yield worthwhile results over time.

By documenting and following a repeatable process, putting the user first, and staying consistent, advisors will be well on their way to having their website ranked on the first page of Google search results (and beyond)!