

15 Examples of Great Financial Advisor Websites

And how you can make your online presence shine

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INTRODUCTION

In today's world, having a website for your advisory firm is a must. But with over 28 million results for "financial advisor" in Google, standing out in the crowd is harder than ever. If prospects can't find you online, they may find a competitor or even turn to a robo-advisor. When done well, a website can be an essential marketing tool for any firm looking to bring in prospective clients and engage the ones you have.

At its core, an advisor's website should serve at least three purposes:

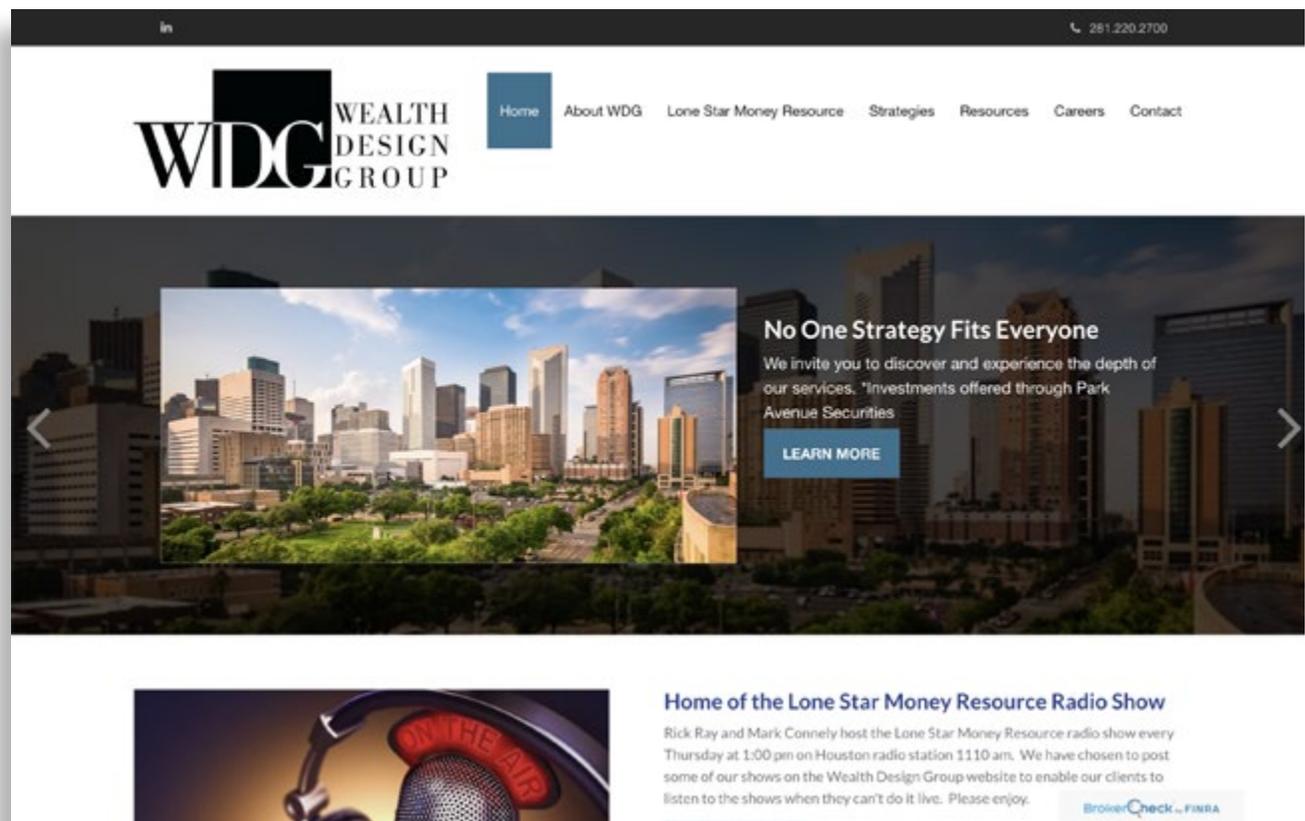
- **Introduce Your Services**
- **Build Trust**
- **Gather Information**

For a website to be successful, it needs to address these requirements and also be well-designed, which is no easy feat. So we've gone through the entire internet (okay, maybe not the whole internet) to highlight 15 financial advisor websites and how they're able to accomplish these goals. We've called out some takeaways and hope it provides some design and concept inspiration for your website!

Wealth Design Group

WWW.WEALTHDESIGNGROUP.NET

It's no wonder that an advisory firm from Houston, Texas would show their pride in the Lone Star State. Wealth Design Group knows their audience and does a great job of establishing who they are and who they help. The little touches of cowboy hats and sophistication let prospective clients see their personality - which goes a long way in establishing trust.

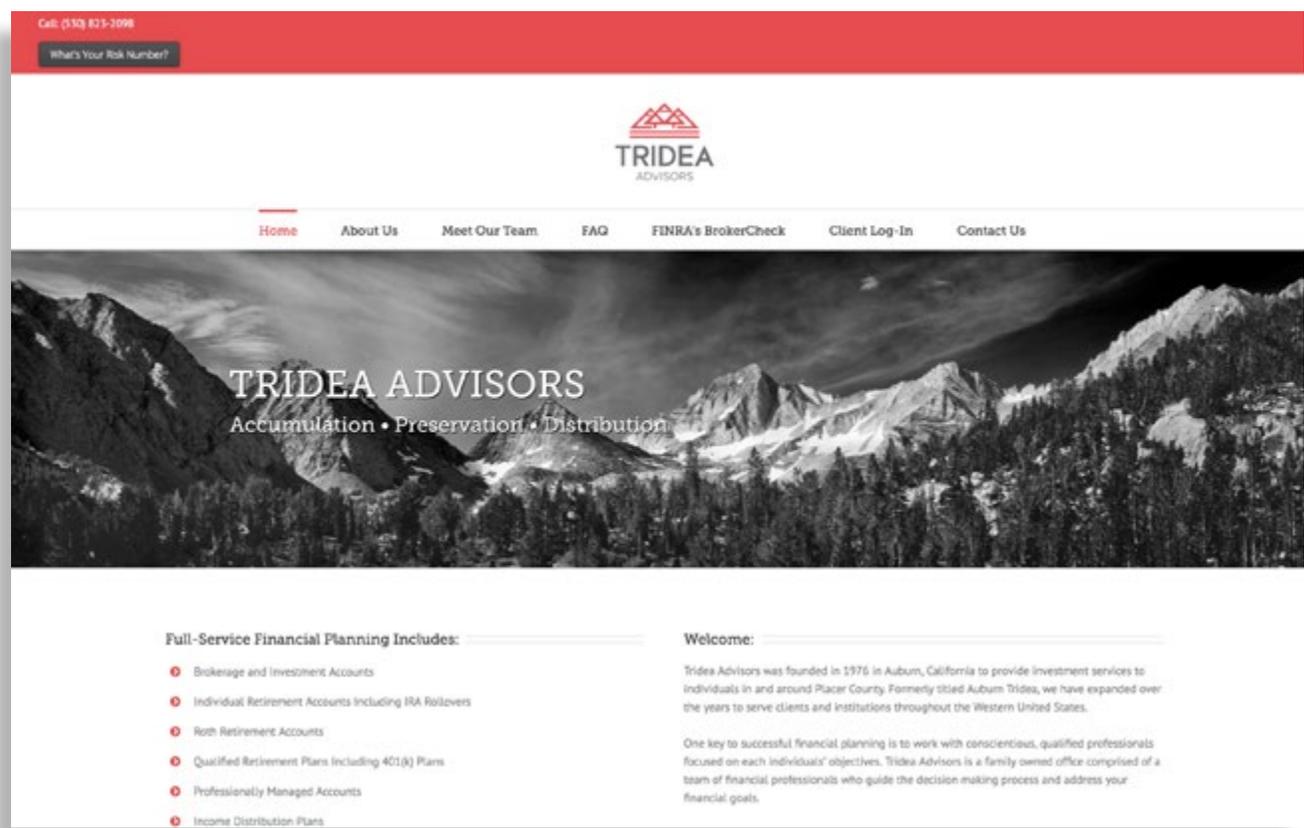


LESSON LEARNED: CATER TO YOUR COMMUNITY

Tridea Advisors

WWW.TRIDEAADVISORS.COM

Sleek design and a clear mission statement set the Tridea Advisors website apart from so many others. The minimalist approach also demonstrates who they are and keeps the focus where it belongs. The clear call to action (in this case, the “What’s Your Risk Number?” button at the top) captures information from prospects in an inbound, non-salesy way. Their simple layout also converts well into a mobile format.

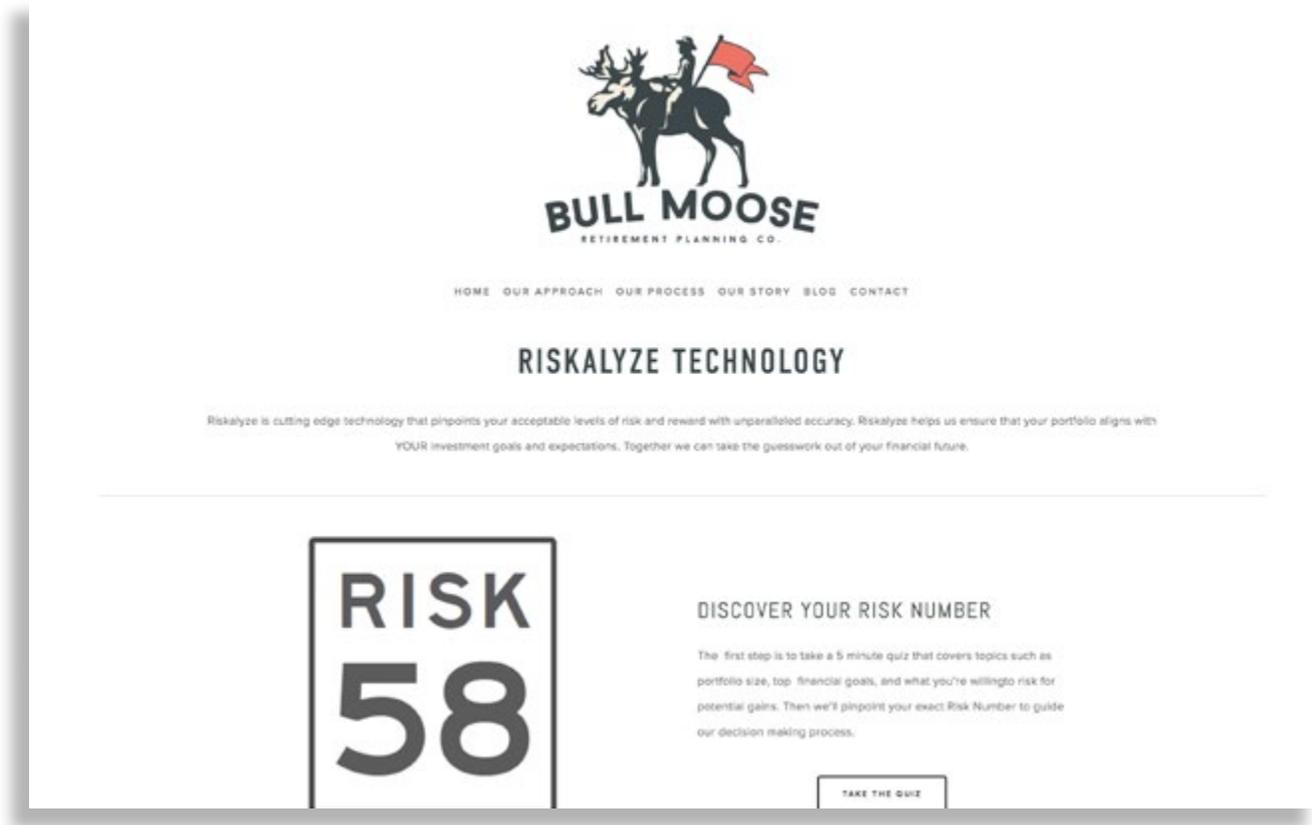


LESSON LEARNED: KEEP IT SIMPLE

Bull Moose Retirement Planning Co.

WWW.BULLMOOSERETIREMENT.COM

Bull Moose Retirement introduces themselves with a classic, American aesthetic. The website uses clean design and high-resolution pictures to show quality - which can be a very effective tool in showing competency. *"After all, if their site is good, I bet their other services are just as good..."* Their message also describes their specialty: financial strategies for those in or nearing retirement. No fuss, no muss (like Teddy Roosevelt himself).

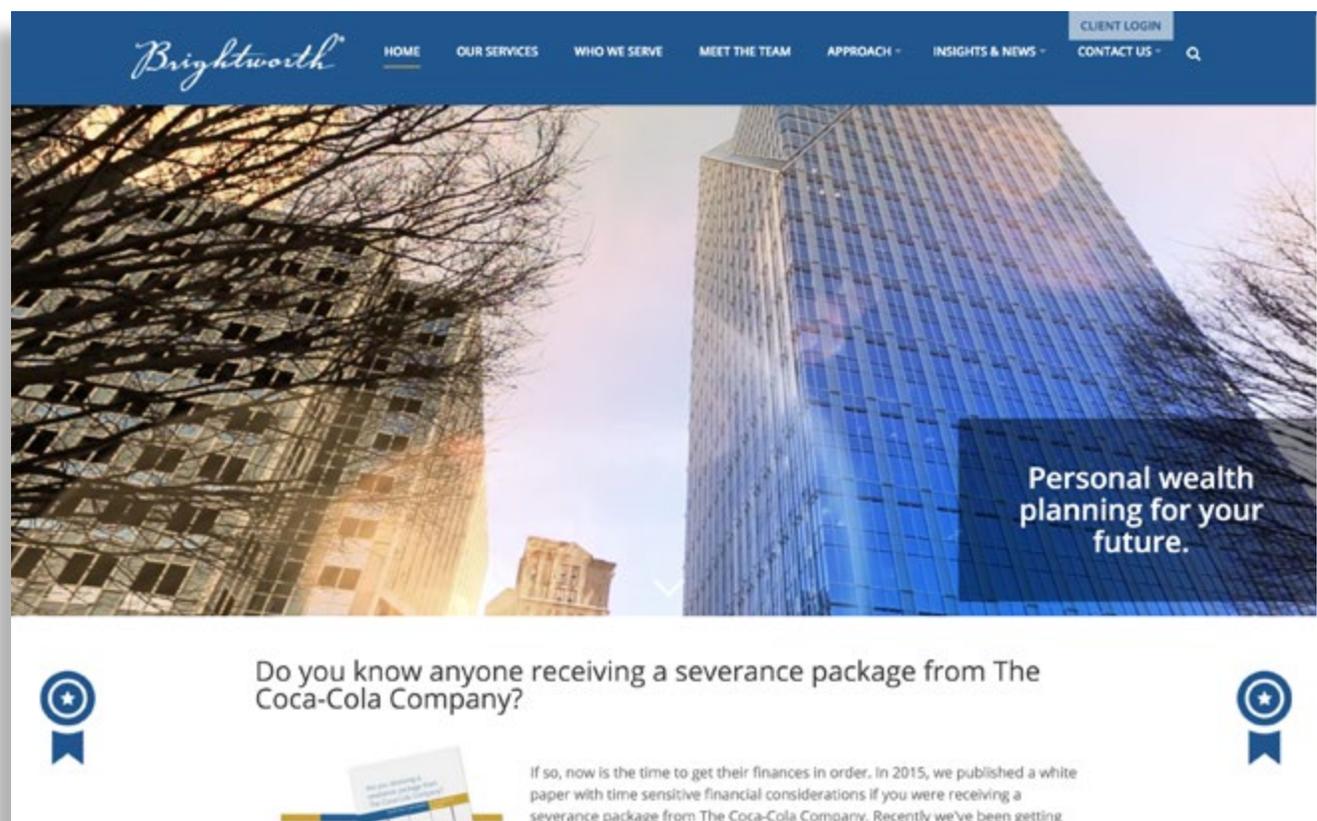


LESSON LEARNED: HAVE A CLEAR MESSAGE

Brightworth

WWW.BRIGHTWORTH.COM

A website that features an interesting visual, like a video, captures a visitor's attention. Brightworth describes their offerings as "Private Wealth Counsel," and that attention to discretion and luxury is well-represented by the video featuring their upscale office in Atlanta's chic Buckhead district. These details are what high net worth prospects look for when choosing advisors.

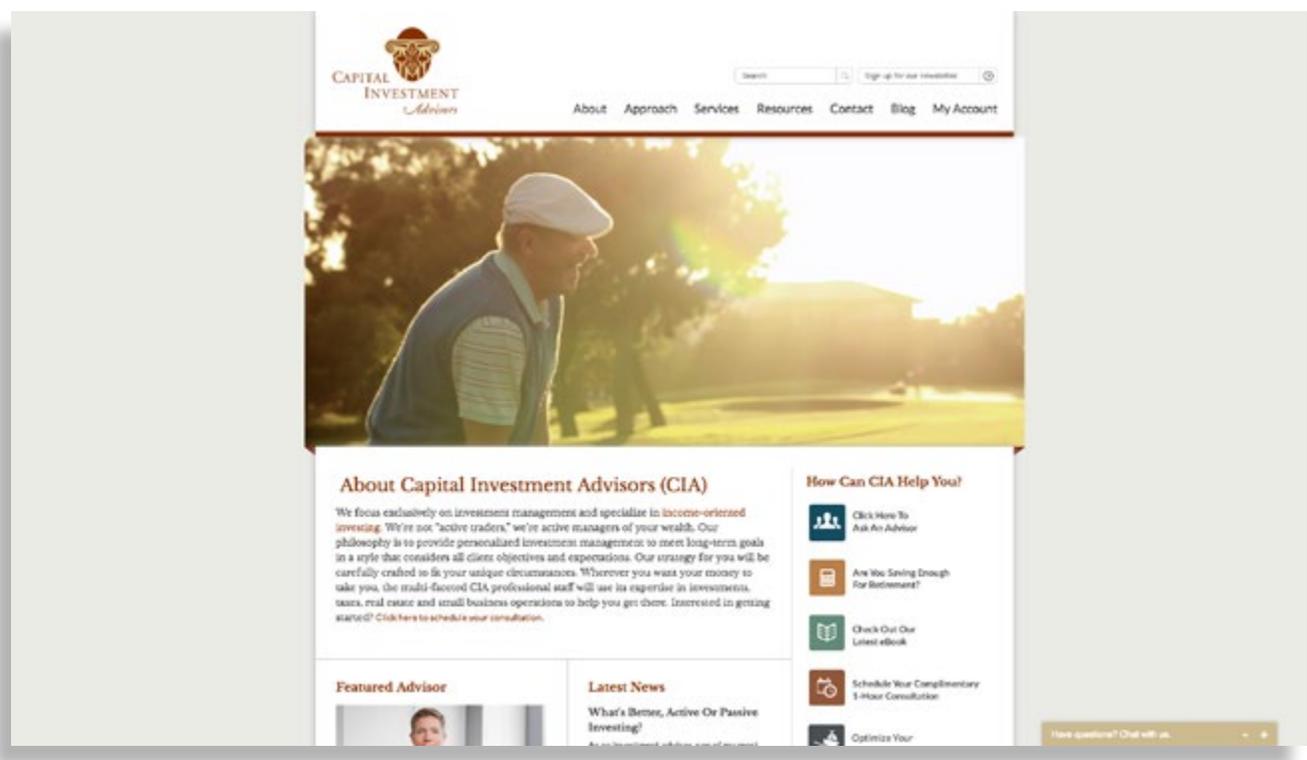


LESSON LEARNED: KNOW YOUR AUDIENCE

Capital Investment Advisors

WWW.YOURWEALTH.COM

Capital Investment Advisors (or CIA) shows how a domain name can be a powerful tool when creating an online presence. “Yourwealth.com” is a phrase that is easy to remember and often searched, which can be an advantage for those looking to increase site traffic. As a general rule of thumb, a URL shouldn't exceed 13 characters between the dots. By the way, this firm also offers e-books and other content when visitors provide their contact information, which allows for a gathering and sharing of information that benefits everyone.

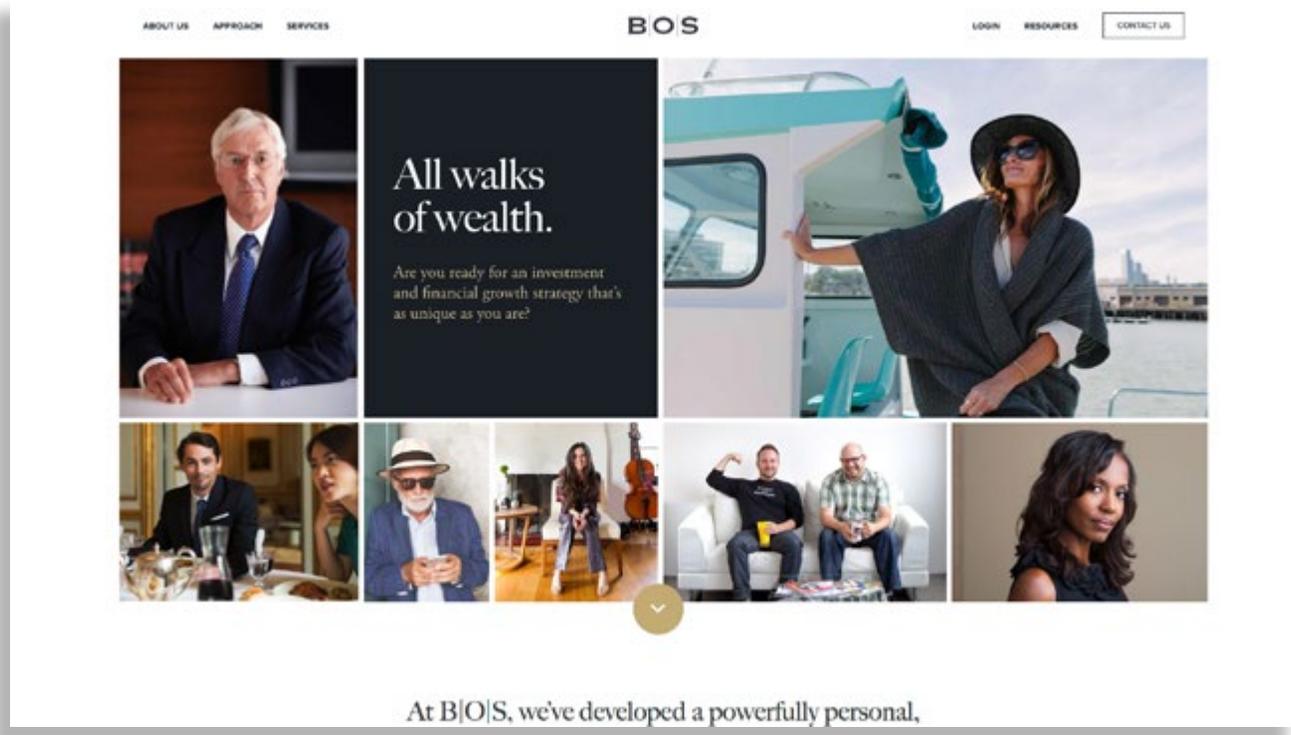


LESSON LEARNED: THINK ABOUT YOUR DOMAIN NAME

Bingham, Osborn & Scarborough, LLC

WWW.BOSINVEST.COM

This firm, based in San Francisco, uses photos and fashion-forward design to showcase their uniqueness in the industry. The firm promises a “powerfully personal” approach to wealth management, and the crisp design affirms that bold statement. Their team of advisors is also featured prominently on the landing page which is a good strategy for showing transparency.

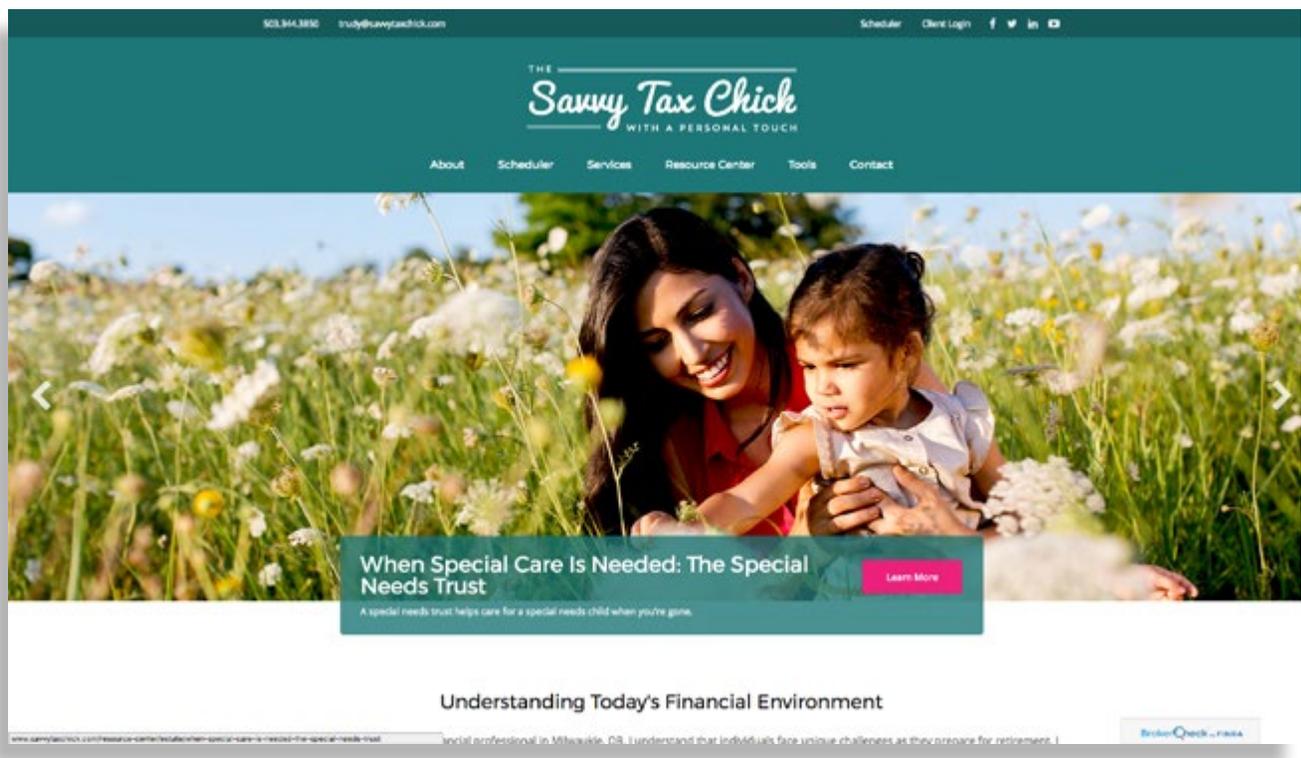


LESSON LEARNED: BE TRANSPARENT

The Savvy Tax Chick

WWW.SAVVYTAXCHICK.COM

If you have a quirky perspective, a website is a great way to show it off. The Savvy Tax Chick uses a unique name to display their personality and appeal to those preferring a less traditional CPA. Another great tip: the About section has a video with the owner of the business, which takes introductions a step farther. Clients appreciate personal touches - in their advisor and their website.

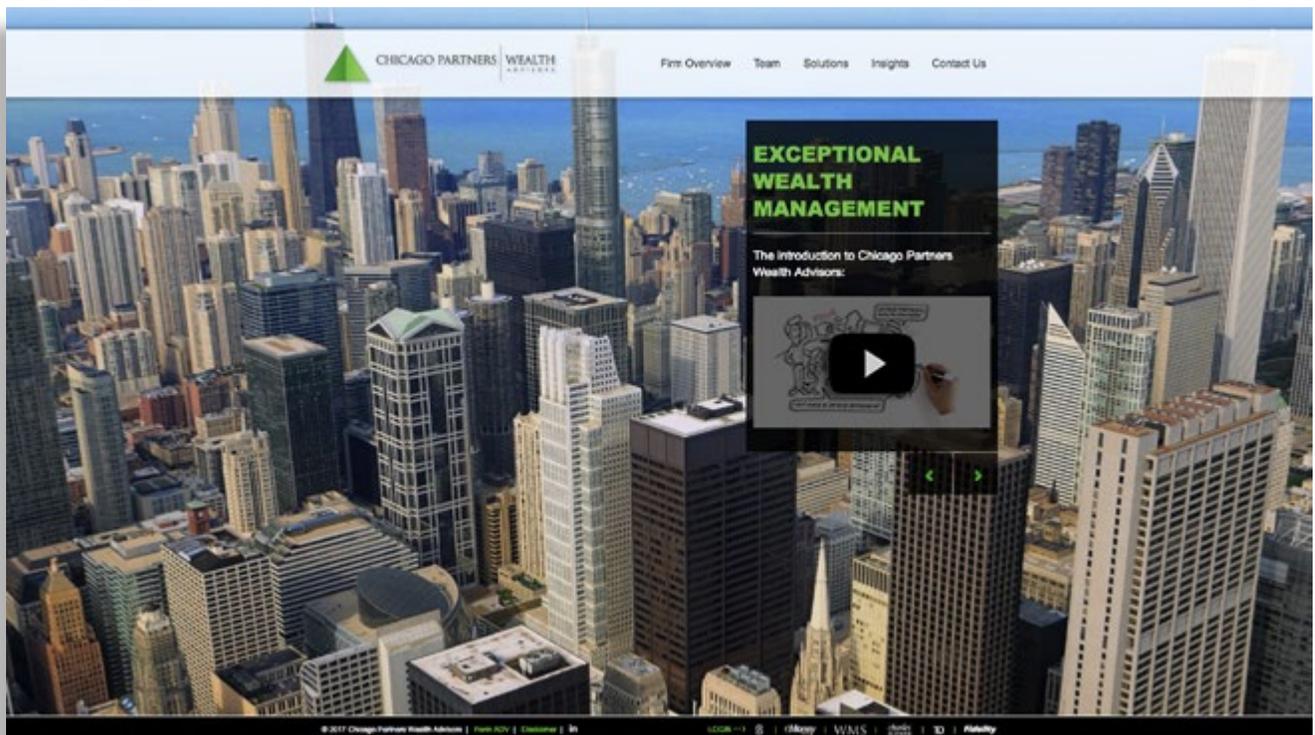


LESSON LEARNED: DON'T BE AFRAID TO BE UNIQUE

Chicago Partners Wealth Advisors

WWW.CHICAGOPARTNERSLLC.COM

The home page for this firm features beautiful, high-quality photos of the iconic Chicago skyline, and with a name like Chicago Partners, we'd expect nothing less. A list of client portals and other integrated sites at the bottom gives investors quick access to log in and check on their account balance, performance, and even their Risk Number®.



LESSON LEARNED: EMPOWER CLIENTS TO LOG IN

Timothy Financial Council

WWW.TIMOTHYFINANCIAL.COM

Just when you think you've seen everything...a giant penny comes rolling out of nowhere. Timothy Financial Counsel uses the unexpected to pique interest. The uncluttered design also allows potential investors to focus on the firm's message, and once you've got their attention, that's the next important step. Using animation to bring the element of surprise isn't something you'd typically associate with a financial advisor's website - but let's give them bonus points for creativity!

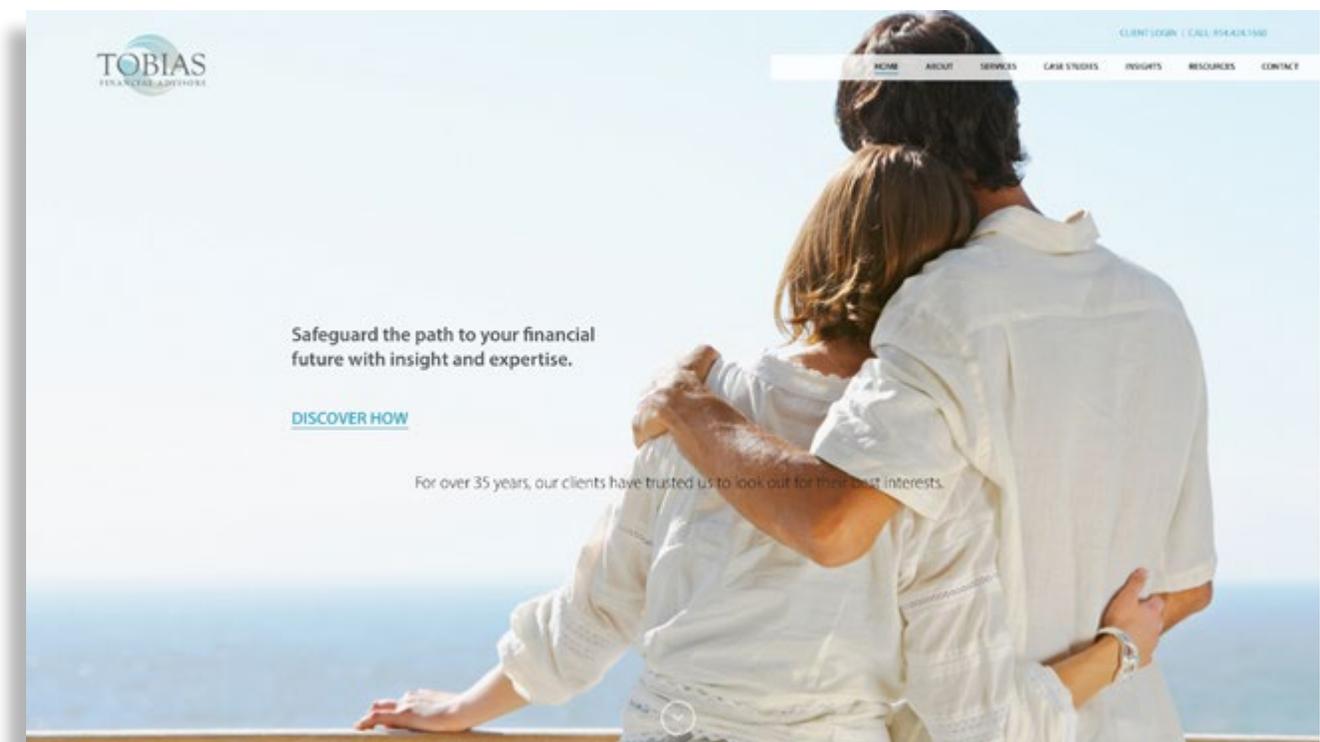


LESSON LEARNED: BE OPEN TO TRYING THE UNEXPECTED

Tobias Financial Advisors

WWW.TOBIASFINANCIAL.COM

Tobias Financial Advisors, a firm outside of sunny Ft. Lauderdale, Florida, knows how to appeal to serious beach aspirations. The calming blue tones and the emphasis on “35 years experience” create the foundation of trust that investors seek in their financial advisor. The site links to a Resources page with FAQs, articles, and other investor information that showcases the firm’s expertise.

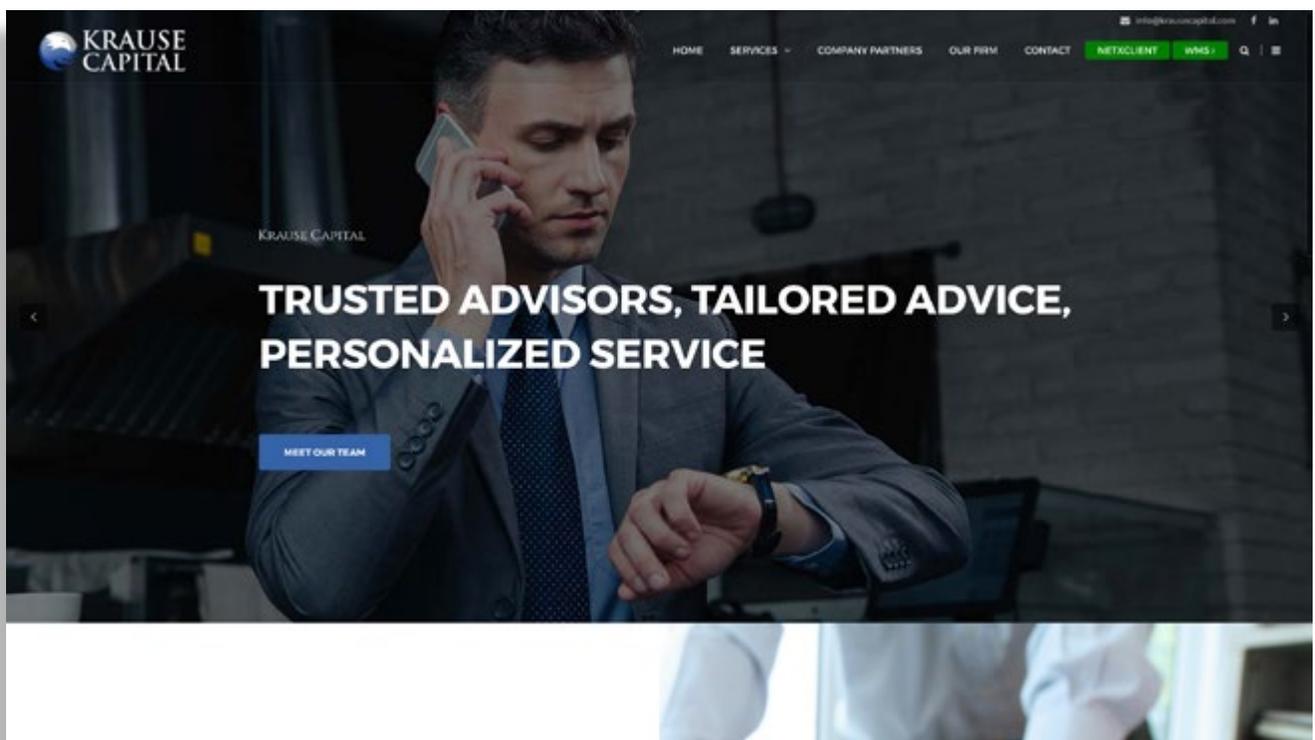


LESSON LEARNED: TALK LIKE AN EXPERT

Krause Capital

WWW.KRAUSECAPITAL.COM

Krause Capital invokes authority with a black and blue color scheme. The “tailored advice” offered by KC also fits in with the site’s buttoned up look. It’s important for firms to keep their core message in line with their website visuals. Making sure the two match means a better first impression and less chance for confusion - what you say and what that looks like go hand-in-hand.



LESSON LEARNED: HAVE THE LOOK MATCH THE MESSAGE

American Advisors

WWW.AMERICANADVISORS-LLC.COM

American Advisors has polished their patriotic website to be consistent with their values. This is an example of branding done right that leaves potential clients with a clear impression of the firm and what they believe. And what more could you expect from a firm that hails from the birthplace of America, Philadelphia?

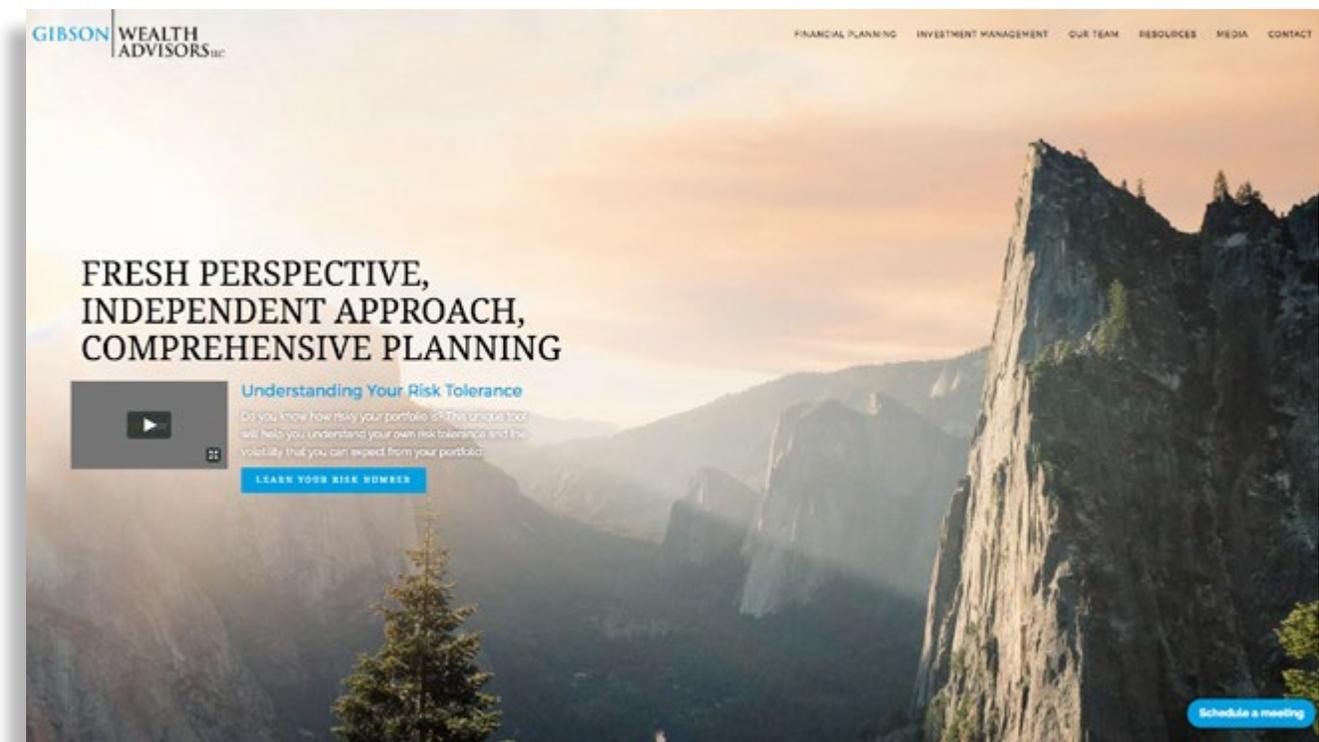


LESSON LEARNED: BRAND YOURSELF

Gibson Wealth Advisors

WWW.GIBSONWEALTHADVISORS.COM

Beautiful design, adventurous imagery, and a canine on staff all make the Gibson Wealth Advisors website an excellent example of an advisor website to watch. The website offers a wealth of resources, as well as information for finding an investor's Risk Number®, and the site is designed so that all sections are easily accessible.

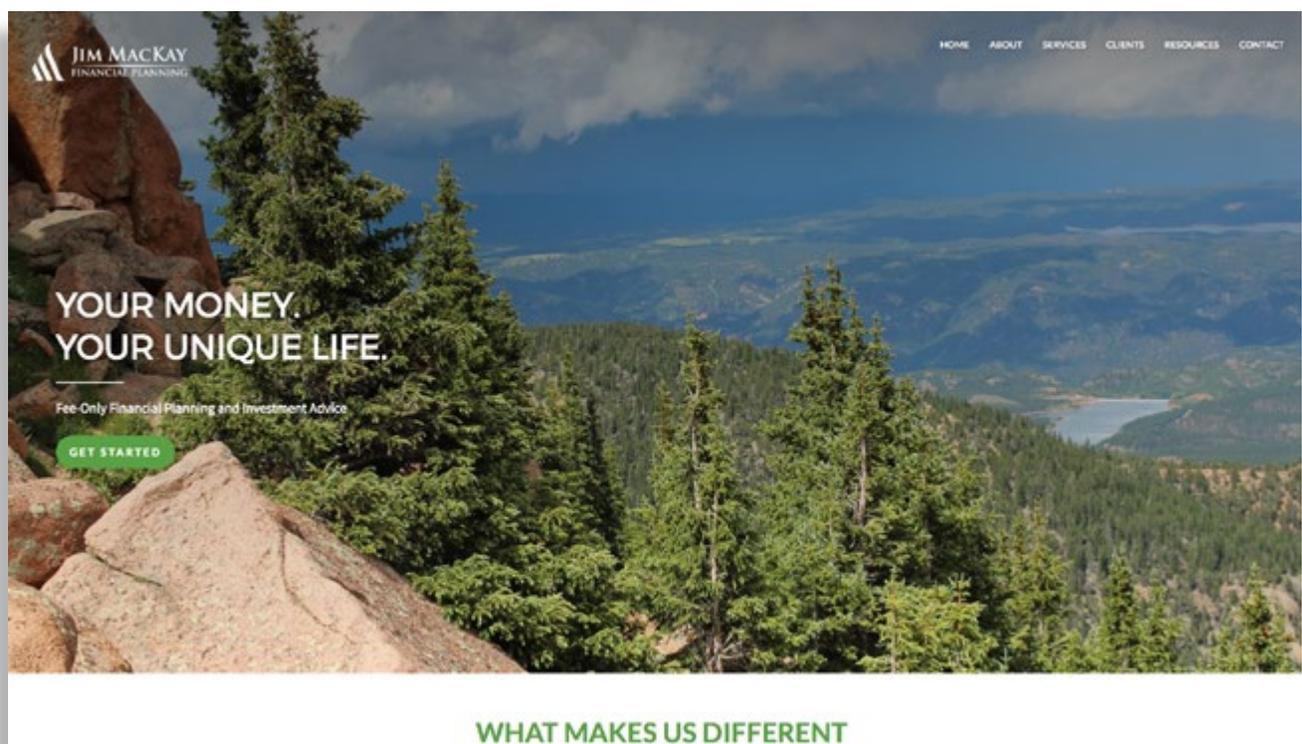


LESSON LEARNED: DESIGN FOR BEAUTY AND FUNCTION

Jim MacKay Financial Planning

WWW.MACKAYFINANCIALPLANNING.COM

This website is focused on an easy to use and pleasant experience for the site visitor from start to finish. Captivating photography and an emphasis on what makes them different are what makes Jim MacKay Financial Planning stand out from other advisor websites.



LESSON LEARNED: TELL THEM HOW YOU'RE DIFFERENT

Mom and Dad Money

WWW.MOMANDDADMONEY.COM

Mom and Dad Money's unique vision (take control of your money so you can take care of your family) is displayed front and center, both in the design of the site and in the domain. The advisor also points out other websites and news sources where they have been featured, which is an excellent way to show expertise in their field.



LESSON LEARNED: LET OTHERS SING YOUR PRAISES

Bottom Line: The best advisors build trust and promote clarity to their prospects and clients with an intentional strategy on the web. Advisors who take a great domain name, promote a clear brand, view their site through the lens of their audience and leverage all of the above to answer questions and capture information should see a healthy ROI for their efforts online. Want to learn how to embed risk assessments into your site to capture prospects' Risk Numbers® and other handy information? We'd be happy to chat.

We hope you find this content useful in your practice. Now go empower some fearless investing!

ABOUT RISKALYZE

Riskalyze is the company that invented the Risk Number®, which powers the world's first Risk Alignment Platform, empowers advisors to automate client accounts with Autopilot, and enables compliance teams to spot issues, develop real-time visibility and navigate changing fiduciary rules with Compliance Cloud. Advisors, broker-dealers, RIAs, asset managers, custodians and clearing firms use Riskalyze to empower the world to invest fearlessly. To learn more, visit www.riskalyze.com.

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