A Marketing Guide for RIAs: Part 3 – Build a Website

By Kristen Luke
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This is part three of a ten-part series on marketing an RIA. Read A Marketing Guide for RIAs for a full overview. To view the installments in this series, select "RIA Marketing Guide" in the left margin.

Once you have defined a niche market and created a messaging platform to clearly communicate your firm's value, you are ready to start creating your marketing materials. The most important piece of marketing communication for your firm will be your website. Prospective clients, current clients and centers-of-influence (COIs) will all visit your website to learn more about your firm and the services you offer. It is critical to make a good first impression.

The first step in building a website is to hire a web designer, who will help you define a "look and feel" that appeals to your niche market. You can hire someone locally or someone who specifically works within the financial services industry. The advantage of working with someone familiar with the industry is that they can help you walk through common compliance issues.

While the designer may be able to help you build the site, more than likely you'll be responsible for the content. The following sections are designed to help you create your website content.

Identify content

Before you begin creating a website, think about the types of information you want to include. Include a balance between standard information about your firm and interactive content that will encourage repeat visits. In other words, your website should be a cross between a brochure and an educational resource.

Keep your target market in mind when completing this exercise. Only include information that is relevant to their needs and interests.

Use the list below to check off the content you would like to include in your website. Additional lines have been provided so that you can include information specific to your firm.

Website Content Checklist
Overview [ ] Home Page
About the Firm [ ] About the Firm [ ] History [ ] Staff Bios [ ] Who We Serve/Our Clients [ ] Community Involvement [ ] Strategic Alliances (e.g. Schwab, TD Ameritrade, Fidelity, etc.) [ ] Investment Philosophy [ ] Mission [ ] The Process [ ] Differentiators/Why Our Firm [ ] ________________________________ [ ] ________________________________ [ ] ________________________________ [ ] ________________________________
Services [ ] Financial Planning [ ] Investment Management [ ] Tax Planning [ ] Estate Planning [ ] College Planning [ ] Retirement Planning [ ] Retirement Plans [ ] Fees [ ] ________________________________ [ ] ________________________________ [ ] ________________________________ [ ] ________________________________
News [ ] Press Releases [ ] In the News (Articles or Videos Featuring Your Firm) [ ] Awards [ ] ________________________________ [ ] ________________________________ [ ] ________________________________ [ ] ________________________________
Resources [ ] Blog [ ] Archived Newsletters [ ] Articles

[ ] Recorded Webinars
[ ] Video Blogs
[ ] White Papers
[ ] Videos
[ ] Podcasts
[ ] E-Books
[ ] Calculators
[ ] Web Links
[ ] Market Summary
[ ] Frequently Asked Questions (FAQs)
[ ] ________________________________
[ ] ________________________________
[ ] ________________________________
[ ] ________________________________

Events
[ ] Upcoming Seminars Dates, Descriptions & Registration Links
[ ] Upcoming Webinar Dates, Descriptions & Registration Links
[ ] Upcoming Special Dates, Descriptions & Registration Links
[ ] ________________________________
[ ] ________________________________
[ ] ________________________________
[ ] ________________________________

Contact
[ ] Contact Us
[ ] Map
[ ] Directions
[ ] Links to Social Media Profiles (Facebook, Twitter, LinkedIn)
[ ] Email Newsletter Sign Up
[ ] ________________________________
[ ] ________________________________
[ ] ________________________________
[ ] ________________________________

Other
[ ] Client Login/Portal
[ ] Privacy Statement
[ ] Disclosures
[ ] Business Continuity Plan
[ ] Terms of Use
[ ] Site Map
[ ] ________________________________
[ ] ________________________________
[ ] ________________________________
[ ] ________________________________

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Outline the structure

Once you have determined which content you want to include on your site, the next step is to create a navigation structure. From the list above, choose five to seven broad main-menu items, which can each have drill-down sub-menus. When the site is complete, the main- and sub-menus will include all of the content you checked above. Use the lines below to identify your main-menu items.

Example:

- Home
- About
- Services
- Resources
- Client Login
- Contact Us

Main Menu

After you have identified the main-menu items, use the items you checked in the content list to create sub-menus. Not all of the information you checked off will be a sub-menu option, and will instead be content included in a page. Reword the content list to fit your business. Use the lines below to identify your sub-menu items.

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Main & Sub Menus Menu	
Main Menu	Sub Menu

Write the content

At this point you have identified the type of content you want to include and have outlined the structure of the site. Now it is time to write the content. Use the boxes below to write the content to include on each main-menu and sub-menu page. Reference the messaging you created in A Marketing Guide for RIAs: Craft Your Message to help create the content for the various pages.

Website Content		
Main Menu	Sub Menu	Content

Through this process, you will have all of the information you need to hand over to the web designer. The designer will be able to take this information and create your new website, making it your most valuable marketing tool.

About Kristen Luke

Kristen Luke is the Principal of Wealth Management Marketing, a firm dedicated to providing marketing strategies and support for Registered Investment Advisors. Kristen works with individual advisors and firms to develop effective marketing plans and provides the back office support required to implement the strategies. For more information, visit www.wealthmanagementmarketing.net.

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