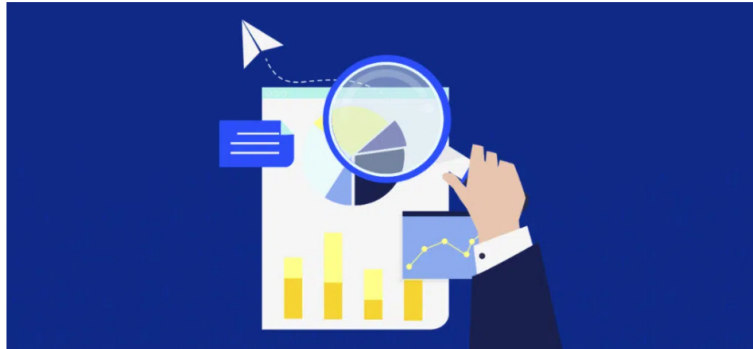


# The AEO Audit Checklist For Financial Advisors



## See Exactly How To Rank #1 In ChatGPT, Perplexity, Claude, And More

A financial advisor we work with did something interesting last week.

He opened ChatGPT and typed: *"Top 5 wealth advisors for doctors in Atlanta."*

Then he held his breath.

He ranked #1.

His exact words to us: *"The money I'm spending with you is paying off."*

That moment didn't happen by accident. It happened because his firm had been systematically optimized for [answer engine optimization \(AEO\)](#)—the strategy that determines whether AI recommends you or your competitor.

If you haven't run an AEO audit on your website, there's a real chance you don't exist in the world your best prospects are searching.



## Why An AEO Audit Matters Right Now

Your prospects aren't just Googling anymore.

They're opening ChatGPT, Perplexity, Claude, and Grok and prompting questions like:

- "Best financial advisor for tech executives in Austin"
- "Retirement planning specialists for physicians"
- "Fee-only advisors for high-net-worth families near me"

As much as [60% of searches now start with AI](#) instead of traditional search engines. If your website isn't optimized for how AI reads and recommends content, you're invisible to a growing segment of your most valuable prospects.

The advisors who've been publishing quality content, strengthening their authority, and building a clear digital presence? They're getting [intro calls from \\$1M+ prospects](#) who

already decided they're the right fit—before the first conversation even happens.

This AEO audit checklist gives you the framework to evaluate exactly where you stand.

## What AI Actually Looks For (The 4 Ranking Signals)

Before you can audit your site, you need to understand what AI is evaluating. Google used to be the gatekeeper. Now it's AI; and it doesn't rank you based on ad spend or how polished your website template looks.

AI ranks based on four core signals:

1. **Authority:** Do you consistently publish [original, helpful content](#) that answers the questions your ideal clients are asking?
2. **Credibility:** Do other sources cite you? Do you have reviews, case studies, and social proof that validate your expertise?
3. **Freshness:** Is your content current, or did you stop blogging in 2022? AI tools favor firms that are actively producing relevant material.
4. **Relevance:** Does your website clearly communicate who you serve and how you help them? Vague positioning hurts you in AI results.

The advisors who've been "too busy" to publish content, optimize their websites, or build authority? They're invisible to AI. The ones who invested in [strategic content and SEO for financial advisors](#) are dominating their niches right now.



## The AEO Audit Checklist: 6 Areas To Review

### 1. Niche and Ideal Client Clarity

AI needs to understand *specifically* who you serve. Generic positioning like "we help clients build wealth" tells AI almost nothing.

Ask yourself:

- Does my [homepage](#) clearly state who I serve (e.g., physicians, business owners, pre-retirees)?
- Do my service pages use language that matches how my ideal clients search?
- Is my niche reflected consistently across my homepage, bio, and blog content?

If your website could describe any advisor in any city, this is your biggest AEO gap. [Niche-focused marketing](#) is one of the fastest ways to improve AI visibility.

### 2. Content Depth and Question-Based Structure

AI surfaces content that directly answers real questions. Thin blog posts and generic financial tips won't cut it.

Check your content for:

- Blog posts that address specific client concerns (tax planning, retirement income, estate planning, etc.)
- H2/H3 headings written as questions (e.g., "How do I minimize estate taxes on \$5 million?")
- Answers that appear immediately in the first 1-2 sentences after the heading
- FAQ sections on key service pages

If your [content marketing](#) strategy hasn't been updated in the past year, AI may be deprioritizing your site in favor of competitors who are publishing regularly.

### 3. Content Freshness

This is one of the most overlooked factors in an AEO audit.

Review:

- When was your most recent blog post published?
- Are your service pages current; do they reflect what you offer today?
- Is your [Google Business Profile](#) regularly updated?

AI tools favor businesses that are actively maintaining their digital presence. Consistent weekly publishing signals that your firm is an active, reliable authority, not a site that was built years ago and forgotten.

## 4. Credibility Signals and Social Proof

AI looks for evidence that other sources trust and reference you. This includes third-party validation you may not think of as "marketing."

Audit your credibility signals:

- Do you have recent Google Reviews from clients?
- Are there published case studies on your website?
- Do other reputable sites (publications, associations, directories) mention or link to your firm?
- Is your bio authoritative; does it include credentials, specializations, and years of experience?

Our [case studies](#) consistently show that advisors who build these trust signals see not only better AI visibility but higher conversion rates from every traffic source.

EXPLORE INDIGO'S CASE STUDIES OF SUCCESSFUL FINANCIAL ADVISORS

## 5. Technical Structure and Page Formatting

Even great content can be invisible to AI if your site isn't structured for machine readability.

Check for:

- Clean formatting with short paragraphs, bullet points, and clear headers
- Proper use of H1, H2, and H3 hierarchy throughout key pages
- Fast load times and mobile-friendly design
- Strong internal linking between your blog posts and service pages

If your [financial advisor website design](#) wasn't built with AI readability in mind, a technical review is a critical part of your AEO audit.

## 6. Location and Service-Specific Landing Pages

Prospects are searching with intent and specificity. "Fee-only advisor in Denver for retirement planning" is the kind of query that surfaces in AI results. And you need dedicated content to match it.

Review:

- Do you have landing pages or [content targeting your city](#) or region?
- Do those pages speak to specific services (estate planning, tax-efficient investing, etc.) rather than serving as generic firm overviews?
- Is your location clearly stated on every key page?

Combining local relevance with niche specificity is one of the most powerful components of [a complete marketing engine for advisors](#).

## What To Do With Your Audit Results

Once you've worked through this checklist, you'll likely fall into one of two categories.

1. **Some gaps are quick fixes:** Updating your bio, adding FAQ sections, refreshing a service page. You can start on those today.
2. **Others require a more systematic strategy:** Particularly around content creation, technical structure, and building ongoing authority. Those are exactly the areas where we help advisors every single day.

In 2026 and beyond, AEO is the new moat. The advisors who rank #1 in ChatGPT and Perplexity will dominate their niches for years. The ones who wait will spend that time wondering why their pipeline dried up.

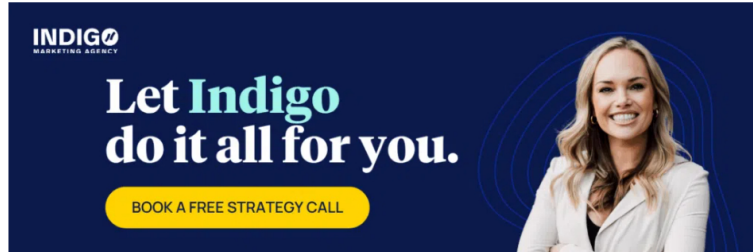
The good news? This checklist puts you ahead of most advisors who still haven't

thought about this at all.

## Ready to turn your AEO audit results into a growth strategy?

Explore our [Total Marketing Package](#) to see how we build AI-ready marketing systems specifically for financial advisors, or [book a free strategy call](#) to talk through your results with one of our experts.

Would you rather one of our marketing experts audit your website for you? We'd be happy to! [Book your free audit call now!](#)



## FAQs: AEO Audit Checklist For Financial Advisors

- ▶ [What is an AEO audit, and why do financial advisors need one?](#)
- ▶ [How is an AEO audit different from a traditional SEO audit?](#)
- ▶ [How often should I run an AEO audit on my advisory firm's website?](#)
- ▶ [What's the most common AEO gap we see in financial advisor websites?](#)
- ▶ [Can I improve my AEO score without rebuilding my entire website?](#)
- ▶ [What does it actually mean for an AI tool to "recommend" a financial advisor?](#)
- ▶ [If I rank well on Google today, does that mean I'm already ranking well in AI search results?](#)



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