

FINTECH INDUSTRY

The Top Advisor Websites of 2023

8 min - 2 Feb 2023

No longer is a functional and visually appealing website something that's just "nice to have." With more clients anticipating a seamless, digital-first experience and more advisory firms adapting to meet their needs, a website has become a necessity.

Your firm's website serves as your first digital impression, and it can be the deciding factor for prospects choosing to book a meeting or move on to the next advisor.

But what makes a great website? It should be able to effectively introduce your services, build trust, gather information, and provide a pleasant, easy-to-navigate experience for the visitor.

To really showcase the importance of an effective website, we rounded up a few of our favorite advisor websites of 2023 (21 of them, in fact). You can use these for inspiration in your next website redesign.

1. Journey Strategic Wealth | journeysw.com

Why It Works: Journey Strategic Wealth updated its firm branding in 2022 and followed up the process with a beautifully redesigned website. From the moment you land on the homepage, you're drawn in by simple, client-focused copy and dynamic, diverse videos and images. To really help put a face to the name, team member images appear front and center, and each person has a warm and inviting smile.

2. Peak Asset Management | peakam.com

Why It Works: Peak Asset Management does a great job leaning into its Colorado roots, from the images used to the cool blue and green color palette. They effectively showcase their firm's expertise and credentials by sharing important information right at the top of the homepage, like the year the firm was founded, how many households they've served, and assets under management. This is an effective technique for building authority and trust right away with your website visitors. Peak Asset Management also promotes a whitepaper right on its homepage, which is an effective lead-generation tool for advisors.

3. Choreo | choreoadvisors.com

Why It Works: Choreo certainly stands out, thanks to its interactive visuals that move throughout the homepage as you scroll. Rather than rely on stock imagery, Choreo has created consistent graphics used throughout the website to give the pages a unique, integrated feel. They offer visitors a robust resource center including videos, market insights, blog posts, articles on current events and more.

4. Beacon Bridge Wealth | beaconbridgewealth.com

Why It Works: Visitors can immediately feel connected to the team at Beacon Bridge Wealth Partners, thanks to their homepage video background. Viewers get an inside look at the firm's office space while seeing the team in action. This is an effective way to quickly warm up cold visitors and make them feel more connected to the firm before they even begin exploring the website.

5. Clarity Wealth Development | claritywealthdevelopment.com

Why It Works: After spending a little time on Clarity Wealth Development's website, visitors are prompted by a pop-up box to subscribe to the firm's monthly newsletter. This is an effective lead-generation tool for encouraging website visitors to stay connected to your firm, even if they aren't yet ready to commit to working with an advisor. Clarity Wealth also provides visitors with a comprehensive FAQ page, which offers more clarification on who they work with, how they work, and what their fee schedule looks like. Being transparent and upfront about these types of common questions helps build trust and allows visitors to self-identify as good prospects.

6. The Investment Center | investmentctr.com

Why It Works: The Investment Center is a broker-dealer, and its website offers an effective mix of showcasing expertise and giving advisors an inside look at the benefits of affiliating. From the impressive array of awards at the top of the page to the advisor testimonials, they paint a clear picture of what working with them will look like for advisors.

7. Moors and Cabot | moorscabot.com

Why It Works: Moors and Cabot is proud of its firm's long and robust history, which is evident as soon as visitors land on their website. Their website sticks to a sleek, muted color palette that appeals to their high-end clientele. Throughout the website, they offer an extensive look at the firm's history, culture, and values, giving visitors a well-rounded view before they ever even make contact with the team.

8. Intervest International | intervestintl.com

Why It Works: Intervest International effectively incorporates graphic elements throughout its website to break up the copy and guide the reader through each section in a visually appealing way. They keep their navigation bar to a minimum, showcasing only the most pertinent information for advisors. This streamlined, easy-to-navigate look helps minimize confusion and keep advisors engaged as they make their way through the pages.

9. Keel Point | keelpoint.com

Why It Works: Keel Point follows a subtle ocean theme throughout the website, which helps build a strong brand identity and create cohesion across all pages. As soon as you enter the homepage, their list of services tells visitors right away if Keel Point may be a good fit for their needs. They smartly separate their primary services and audiences into different pages on the website, allowing visitors to navigate right away to the area of the site with the most relevant information.

10. Dandarah Wealth Management | dandarah.ceterainvestors.com

Why It Works: Dandarah incorporates a slideshow of options and CTAs on its homepage, which is great for engaging visitors and encouraging them to take action. The rest of the site's copy is sleek, minimal, and focused on offering solutions for clients and prospective clients. They even added a personal touch to the site by including Cooper D'Andrea, their Chief Rollover Specialist, on their homepage and team page.

11. IFP | ifpartners.com

Why It Works: Independent Financial Partners makes it apparent who they are and what they do immediately on their homepage. They use minimal copy, but what is there packs a powerful punch. Advisors can quickly learn how IFP is different from other broker-dealers and what sort of offerings they provide — all before ever leaving the homepage. Several pages on the site include subtle video backgrounds that share more about who IFP is and what working with them will look like.

12. Dreyer Wealth | dreyerwealth.com

Why It Works: With the tagline "Simplifying the Complex," Dreyer Wealth Management lets prospective clients know from the start how they'll bring value to their lives. They include an integrated online scheduler, which visitors can access with the click of a button, no matter where they are on the website.

13. Financial Fitness | financialfitnesswm.com

Why It Works: Health and wealth often go hand in hand, and Financial Fitness effectively combines the two throughout its website. The bright, beachy imagery reflects the firm's Myrtle Beach location, and the personal photos included at the bottom of the homepage help viewers make a more personal connection with the firm. Not to mention, its single-scroll setup helps site visitors quickly move throughout the page without feeling overwhelmed or lost.

14. Makers Wealth Management | makerswealthmanagement.com

Why It Works: Makers is a modern wealth management firm that excels at using personal stories to drive its marketing efforts. Created by women, for women, this website uses dynamic images of the firm's founders to guide visitors through the site. All copy is geared toward helping the viewer self-identify as a good match while also emphasizing the firm's strategic difference — being a woman-owned firm in a male-dominated industry.

15. Guardian Financial Group | guardianfg.com

Why It Works: Guardian Financial Group's founder, Matt Pontes, uses his background as a member of the U.S. Air Force to bring a unique perspective to financial planning. As viewers navigate the site, they learn more about Matt and his team while receiving a high-level overview of what services are offered. The site is sleek, personable, and easy to navigate.

16. Millennium Planning Group | mpgplan.com

Why It Works: Millennial Planning Group makes it clear that they do things a little differently, as evidenced by their website keeping things short, sweet, and to the point. As a virtual-first firm, they expertly strike a balance between being personable and offering important technology integrations, such as Nitrogen's Risk Number® assessment tool.

17. Dream Financial Planning | dreamfinancialplanning.com

Why It Works: Dream Financial Planning's homepage is, quite literally, dreamy to look at. With incredible, on-theme images and icons, this website catches and retains the viewer's attention. They offer multiple calls to action (CTA) right on the homepage, directing people to schedule a call, assess their portfolio's level of risk or check their retirement readiness. As viewers scroll through the site, they're met with client personas that can help them clearly understand who Dream's ideal client is and what their fees are.

18. Midwest Financial Group | mfgfa.com

Why It Works: Midwest Financial Group uses serene imagery to immediately put the viewer at ease. Right on the homepage, they offer site visitors immense value by providing access to Nitrogen's Risk Number assessment tool. Whether someone chooses to work with them or not, the team is already demonstrating a commitment to helping visitors make the most of their asset allocations.

19. Carson Wealth | carsonwealth.com

Why It Works: A great way to demonstrate your firm's expertise is to include publications or news outlets where your advisors have been featured or quoted. Carson Wealth displays this information toward the top of its homepage, building trust with viewers almost immediately. As viewers scroll, the firm goes on to clearly define its target audiences and their specific pain points. Perhaps most unique of all, Carson includes an interactive element to its site, which allows viewers to complete the quiz and better understand which investment strategy is right for them.

20. Meyer Wealth Advisors | meyerwealth.com

Why It Works: Meyer Wealth Advisors has chosen to hone in on a very specific audience, which it clearly defines as "Professionals who receive equity-based compensation." The entire site is dedicated to addressing the specific needs of this audience. It even sets forth a clearly defined plan of action and fee structure for those who choose to move forward.

21. Allen Capital Group | allencapgroup.com

Why It Works: Allen Capital Group devotes a significant portion of its homepage to helping visitors understand the importance of risk and identify their unique Risk Number through Nitrogen's interactive tool. Their website is serving as a lead generation machine and helping the firm to build authority and trust right from the get-go.

22. Beyond Your Exit Wealth Management | beyondyourexitwm.com

Why It Works: Another niche-focused site, Beyond Your Exit, speaks directly to its target audience from the start — business owners looking to build an exit strategy. It uses first-person copy to really build trust and create a personal connection between the visitor and the advisor. Visually, this site is moody and modern with a high-end feel.

23. All Street Wealth | allstreetwealth.com

Why It Works: All Street Wealth is fresh and young and immediately offers a different take on financial planning than what visitors might be used to. The site is geared toward millennials, which is evident by its use of emojis, personal photos, and disruptive language. Because they're working with a cost-conscious crowd, they offer simple pricing and an easy-to-follow process. To help keep visitors engaged (even if they're not ready to work together!), the firm offers free guides and educational articles geared toward the target audience.

Connect with Nitrogen

Want to find more ways to capture clients' and prospects' interests by putting the Risk Number front and center on your website?

Learn More

Ask Claire