TJ YIELD STUDIO

FREE AUDIT

The Advisor Website Conversion Audit

27 things your financial services website needs to convert cold traffic into enquiries.

For independent **financial advisors**, **insurance brokers** & **fintech founders**.
Built by someone who spent 8 years inside financial services before ever opening Figma.

How to use this. Open your website on a laptop **and** your phone, then go through these 27 checks honestly. Tick what you pass. Anything you can't tick is a reason a potential client clicked away without enquiring.

This isn't about making your site prettier. Every check exists for one reason: **financial services clients are risk-averse, and your website's job is to make a careful person feel safe enough to take the next step.**

THE 8-SECOND RULE

A first-time visitor decides whether to trust you in roughly 8 seconds. Checks 1–6 are what they judge you on in that window. Get those right first.

PART 1

First Impression & the 8-Second Trust Test

01 ☐ **Your headline states an outcome, not a welcome.**
"Welcome to [Firm]" says nothing. Name *who you help* and *what they get* — e.g. "Independent financial advice for pre-retirees in Sydney."

02 ☐ **A real human face is visible above the fold.**
Not a stock handshake or a glass tower. Trust-driven clients buy the person before the firm. Your actual photo beats any graphic.

03 ☐ **It's clear within 5 seconds who you help.**
"Financial planning for everyone" is invisible. A specific audience makes the right person lean in.

04 ☐ **There is one obvious next step above the fold.**
A single, clear call to action. If a visitor has to hunt for what to do next, they leave.

05 ☐ **The page loads in under 3 seconds.**
Every extra second loses visitors. Slow sites also read as "outdated" — dangerous for a trust business.

06 ☐ **It doesn't look like a template ten other advisors use.**
Generic is a quiet red flag for a careful buyer. Your site should feel like *you*, not a theme.

PART 2

Credibility & Compliance — your trust engine

07 ☐ **Credentials and licensing are visible high on the page.**
For this buyer, credentials aren't fine print — they're the pitch. Don't bury them on an "About" page nobody visits.

08 ☐ **Your AFSL / registration / regulatory details are present and correct.**
(AFSL for AU, SEC/state for US RIAs, FCA for UK.) Missing or hidden regulatory info erodes trust *and* creates compliance risk.

09 ☐ **Disclosure is clear and readable — not buried in 8pt grey text.**
Good disclosure, done well, is a *trust signal* — not a liability. Deliberately unreadable disclosure is the worst of both worlds.

10 ☐ **Professional memberships / accreditations are shown.**
Industry bodies, certifications, awards — concrete proof you're established and accountable.

11 ☐ **A real "About" that builds confidence, not just history.**
Who you are, why you do this, who you help — written to reassure, not to recite a timeline.

12 ☐ **Privacy policy and terms are present and easy to find.**
Their absence signals carelessness to exactly the detail-oriented client you want.

PART 3

Messaging & Positioning

13 ☐ **You speak to a specific client, not "everyone."**
The more precisely you name your ideal client's situation, the more that client feels understood.

14 ☐ **You lead with the client's problem, not your services.**
"Worried you're paying too much tax?" beats "We offer tax planning." Problem-first language gets attention.

15 ☐ **The language is plain, not jargon.**
Jargon hides uncertainty and creates distance. Clear language signals you can actually explain things — which is what advice *is*.

PART 3 · CONT.

Messaging & Positioning

16 ☐ **You've named what makes you different.**
Independent? A niche specialty? A unique background? Give the visitor a reason to choose you over the advisor down the road.

17 ☐ **The tone feels human, not corporate.**
Your biggest edge as an independent is that you're a person, not an institution. Your copy should sound like one.

PART 4

Social Proof

18 ☐ **Testimonials that tell a story.**
"Great service!" does nothing. "When my husband passed, [name] handled everything" does everything. Specific situations beat generic praise.

19 ☐ **Testimonials include a real name (and photo/role where allowed).**
Anonymous quotes read as invented. Real attribution = real trust. (Check your jurisdiction's rules on testimonials.)

20 ☐ **There's proof of results or experience.**
Years in practice, clients served, claims handled, funds advised — whatever's true and compliant for your field.

21 ☐ **Any "as seen in," partner, or media logos are shown.**
Third-party validation lowers a nervous visitor's guard (if you have them).

PART 5

Conversion & Lead Capture

22 ☐ **Your primary CTA is low-commitment and human.**
"Book a free 15-minute intro call" converts far better than "Get a Quote" or "Contact Us." Lower the stakes of the first step.

23 ☐ **You offer a path for people who aren't ready yet.**
A guide, checklist, or newsletter captures the "interested but cautious" visitor instead of losing them.

24 ☐ **Your contact form is short.**
Every extra field loses people. Start with 3 fields; get the rest on the call.

25 ☐ **Phone, email, and location are easy to find.**
For a trust business, being easy to reach *is* a trust signal. Don't hide behind a form.

26 ☐ **The same clear CTA repeats down the page.**
A visitor decides to act at different points. Give them the door more than once.

PART 6

Mobile & Technical

27 ☐ **Your site works flawlessly on a phone.**
More than half your visitors are on mobile. Tiny text, hard-to-tap CTAs, or a broken layout lose the majority of your traffic before they read a word.

SCORE YOURSELF

Count your ticks

24–27	**Strong.** Your site is built to convert. Focus on traffic and content.
18–23	**Decent foundation, leaking leads.** A focused round of fixes will lift enquiries noticeably.
12–17	**Looks like a brochure, not a salesperson.** The structure is working against you.
<12	**Actively costing you clients.** The highest-ROI thing you can fix in your business right now.

Want a second pair of eyes on your actual site?

If you ticked everything — genuinely, well done. Most financial services sites don't. If you didn't, the good news is every item is **fixable**, and most are about structure and trust, not budget.

I'll record a short, free Loom walking through exactly where *your* site is leaking trust and leads — no pitch, no obligation.

→ DM me "audit" on LinkedIn

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TJ — Yield Studio
Webflow + brand design for financial advisors, insurance brokers & fintech founders.