

SEO Guidelines: Emerald Client On-boarding

“Browser Title Bar”	<ul style="list-style-type: none"> • Always fill out the “Browser Title” field. • Use the following format for client Browser Titles: <ul style="list-style-type: none"> ○ [fa/co. name], Financial Advisor, [city] [state abbrev.] <ul style="list-style-type: none"> ▪ <i>Example 1: Kirk Cartwright, Financial Advisor, Gold River CA</i> ▪ <i>Example 2: KCA Wealth, Financial Advisors, Camp Hill PA</i> • Do not use the same Title for every page (<i>Google considers this “Duplicate Content”</i>).
“Default Site Description”	<ul style="list-style-type: none"> • Start with a call-to-action to promote click-through in Search Results. <ul style="list-style-type: none"> ○ E.g. “Find”, “Learn more”, “Read about” • Include keywords: ‘financial advisor’, [city] [state abbrev.], [fa/co. name] • Keep character counts to under 300 words. <ul style="list-style-type: none"> ○ <i>Example: “Learn more about Kirk Cartwright, a financial advisor in Gold River CA. Offering professional financial advice & retirement planning with personalized service”</i>
“Default Key Words”	<ul style="list-style-type: none"> • Do not use this field. Google doesn’t use the field for ranking web pages.
“Link Text” for Custom Pages	<ul style="list-style-type: none"> • Include page topic or keywords that are relevant to the page copy. <ul style="list-style-type: none"> ○ E.g. If a page is called “Retirement Planning use “<i>retirement-planning</i>” for Link Text • Use lowercase letters. • Use hyphens for spaces.
“Site Title”	<ul style="list-style-type: none"> • Use the following Site Title format for all clients – barring the client approves updating this text: <ul style="list-style-type: none"> ○ [fa name]: Financial Advisor in [city], [state abbrev.] <ul style="list-style-type: none"> ▪ <i>Example 1: Kirk Cartwright: Financial Advisor in Gold River, CA</i>
“Home Page Text”	<ul style="list-style-type: none"> • Include one or two (at most) mentions of <i>each</i> keyword within the Home Page Text: <ol style="list-style-type: none"> 1. [FA or company name] 2. [primary keyword] 3. [city] [state abbrev.] <ul style="list-style-type: none"> ○ <i>Example 1: “Kirk Cartwright is a Financial Advisor located in Gold River, CA...”</i> ○ <i>Example 2: “Located in Gold River, CA, the KCA Wealth Management group...”</i> • All Home Page Text should be <u>unique</u>. Do not copy text from one site to another.
“Masthead Logo”	<ul style="list-style-type: none"> • Rename the Masthead image name to the following structure, and re-upload: <ul style="list-style-type: none"> ○ [fa-name]-[city]-[state]-masthead.[file type] <ul style="list-style-type: none"> ▪ <i>E.g. kirk-cartwright-gold-river-ca-masthead.jpg</i> ○ Use hypens for spaces ○ Use all lowercase letters • Don’t select “Do not optimize or resize image”
“Home Page Picture”	<ul style="list-style-type: none"> • Rename the Home Page Picture image (“Image File”) to the following structure, and re-upload: <ul style="list-style-type: none"> ○ [fa-name]-financial-advisor-[city]-[state].[file type] <ul style="list-style-type: none"> ▪ <i>E.g. kirk-cartwright-financial-advisor-gold-river-ca.jpg</i> ○ Use hypens for spaces ○ Use all lowercase letters • Don’t select “Do not optimize or resize image”

Keywords: Overview

To understand how we've developed the recommendations for the SEO guidelines, we need to understand the importance of keyword selection and that process.

At a base level, keywords are words that appear in Search Engines with a listing of related websites deemed 'relevant' by Google, et al. We can look at commonly used keywords to find local advisor businesses to determine which would be ideal for Emerald clients.

Keyword Strategy: For Emerald Client Sites

Organic Search keywords for Broadridge/Emerald clients should drive two things: 1.) relevant Search Engine traffic and 2.) website leads. To that end, we need to look at the industry of Emerald clients, and which keywords potential clients are using in Google and how often (search volume).

We can use monthly Search Volume data of keywords that people are using on a monthly basis. "Financial Advisor" drives the most search volume relative to this field – see list below.

Keywords	Monthly Search Volume
"Business" terms (Keywords related to the business)	
financial advisor	165,000
wealth management	49,500
retirement planning	33,100
financial advisor near me	22,200
financial consultant	18,100
investment advisor	9,900
wealth advisor	3,600
find a financial advisor	1,600

However, due to the high competition for 2-word phrases such as 'financial advisor', we must add qualifiers to narrow the focus and compete locally. Adding the locality (city & state) to the primary keyword (financial advisor) achieves this. E.g. "financial advisor in miami fl". These are called "Longtail" keywords.

Here is the base keyword strategy for Emerald FA sites:

'Financial Advisor' + FA Name (or company name) + **City / State**

Note: All of this is relative to each individual FA, and their locality.

Google Search Results: Overview

“Organic” Search results are where we can (ideally) get client sites found using the SEO techniques listed previously. Secondly, we can optimize for Google Maps results as well, but those are a different set of guidelines.

The image shows a Google search interface for the query "financial advisor camp hill pa". The search bar is highlighted with a yellow box. Below the search bar, the "All" tab is selected, and a "keyword" callout points to the search input. The results are categorized into three sections:

- Ads:** A green callout labeled "ads" points to the top three search results, which are advertisements for Prudential, Edward Jones, and Pershing.
- Local, or "Maps" results:** A blue callout labeled "local, or 'Maps' results" points to the map section, which displays a map of Camp Hill, PA, with several financial advisor locations marked. Below the map, a list of three advisors is shown: Conte Wealth Advisors, LLC; Waddell & Reed, Inc. - Financial Advisors: Camp Hill, PA Bran...; and Edward Jones - Financial Advisor: Peter B Arnold.
- "Organic" results:** A red callout labeled "'Organic' results" points to the bottom section of the page, which contains organic search results from Angie's List, Raymond James, KCA Wealth, Edward Jones, US News Money, and Ameriprise Financial.

ads

local, or "Maps" results

"Organic" results

