

# How Advisors Get Found in ChatGPT

*A one page cheat sheet for financial advisors who want to show up when prospects ask AI tools for recommendations.*

## 25%

OF AFFLUENT AMERICANS ALREADY PLAN TO USE AI TO FIND ADVISORS

## 96%

RESEARCH REFERRALS ONLINE BEFORE REACHING OUT

## 83%

LOOK FOR ONLINE REVIEWS ABOUT AN ADVISOR AFTER A REFERRAL

### Why AI picks some advisors over others

#### 🗪 Structured data AI can find & understand

- ▶ Consistent name, credentials, contact details across your website, LinkedIn, directory profiles
- ▶ Language regarding fiduciary status and fees
- ▶ Areas of specialization/niche clearly articulated
- ▶ Geographic reach + fee structure transparency
- ▶ FAQ, Review, Financial Services & Award schema

#### ★ Independent third-party reviews

- ▶ AI downweights testimonials on business websites (perceived to be self-curated with inherent bias)
- ▶ Balanced sentiment (all reviews shown)
- ▶ High domain authority and established credibility
- ▶ Review schema markup optimized for AI search
- ▶ Zocdoc for physicians → Wealthtender for advisors

### The 4 strategies that move the needle

#### 01 Optimize/align website & directory listings

Keep your website, LinkedIn and directory profiles current, consistent & transparent. Use a modern website provider or hosting platform that loads quickly and incorporates schema markup. Include FAQs that disclose fees and display testimonials.

#### 02 Collect reviews systematically

Compliant third-party reviews are your single biggest AI visibility lever and help you stand apart from the 90% of advisors without reviews. ChatGPT reads your reviews to understand and convey the value you deliver through the lens of client feedback.

#### 03 Showcase your specializations

Prospects are asking ChatGPT for help finding financial advisors who serve clients with particular needs just like their own. Specificity wins.

#### 04 Write 8–10 conversational FAQs

Include FAQs on your website and directory profiles - fee model, services, specializations. Use FAQ schema. Format questions the way prospects ask.



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