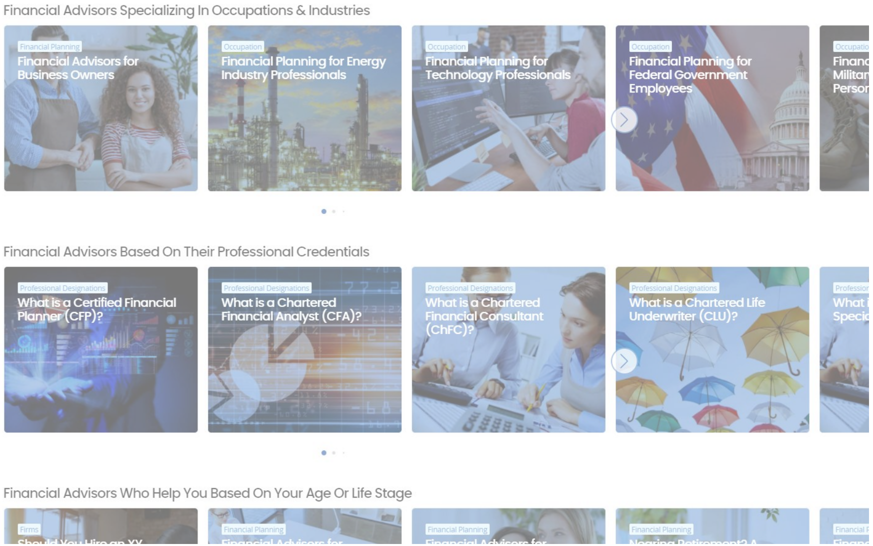


wealthtender

Financial Advisor **Benefits Directory**

Modern Advisor Marketing ™

DOWNLOAD NOW

Your Guide to All the Perks for Financial Advisors in the Wealthtender Community

wealthtender

On Your Mark.

Get Set.

Grow!

Financial Advisor Benefits Directory

Choose the Benefits Most Important to **You**

Modern Advisor Marketing

As a member of our growing community of financial advisors, you're positioned to lead the industry in attracting new clients throughout the historic transfer of trillions of dollars in wealth from Baby Boomers to Millennials over the next decade.

In this guide, you'll discover the wide range of benefits available to you. Because every advisor is different, you may decide to first focus on benefits that increase awareness for your professional brand and unique services. Or perhaps you're ready to get started with Certified Advisor Reviews™ to turn your existing clients into a powerful new source of referrals.

Building your online reputation is a marathon, not a sprint. Begin with the benefits most important to you and revisit this guide anytime to explore more ways to make the most of your experience.

If you have questions or need help getting started, simply email yourfriends@wealthtender.com anytime and we'll follow up right away.

Modern Advisor Marketing with Wealthtender provides your future clients with the knowledge and reassurance they need to hire you with confidence and conviction.

Which Benefits Would You Like to Explore First?

Financial Advisor Benefits Directory

What's Inside...

Modern Advisor Marketing ™

*The top of the modern advisor marketing funnel is all about **creating awareness** for your professional brand and your unique services.*

Section 1 Highlights

- Your Optimized Profile Page
- Financial Advisor Directory
- Local Advisor Guides
- Advisor Specialty Search
- WISE Search Engine
- Promote Your Podcast
- Social Media Amplification

Creating Awareness

Benefits to Attract Your Ideal Clients

Stand Out with Your Optimized Profile Page

Creating Awareness

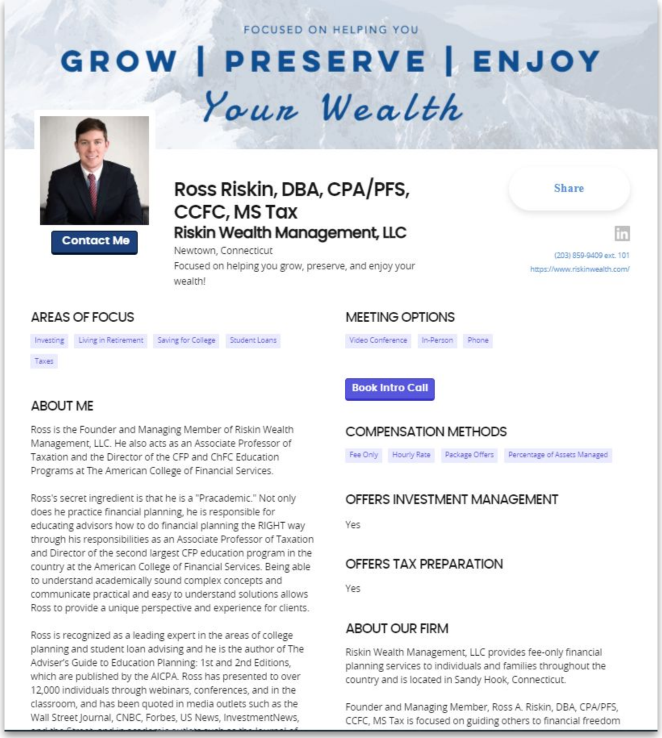
Attract Your **Ideal Clients** With An Optimized Profile Page

Your Wealthtender profile showcases your experience, credentials and areas of focus, strengthening your online reputation and helping people ready to hire a financial advisor feel more confident about working with you.

Connect your calendar using Calendly, HubSpot or the scheduling tool of your choice and get appointments directly from visitors to your profile page.

Setting up your profile is as easy and similar to editing your LinkedIn page. Or choose our *Done for You* service and we'll set up your profile page for you with details from your website and social media accounts. Then simply personalize your profile further as you wish.

Your optimized profile page helps you rank higher in search results and build trust with your future clients.



Financial Advisor Benefits Directory

Get Found in the Financial Advisor Directory

Creating Awareness

Get Discovered by Your **Ideal** Future Clients

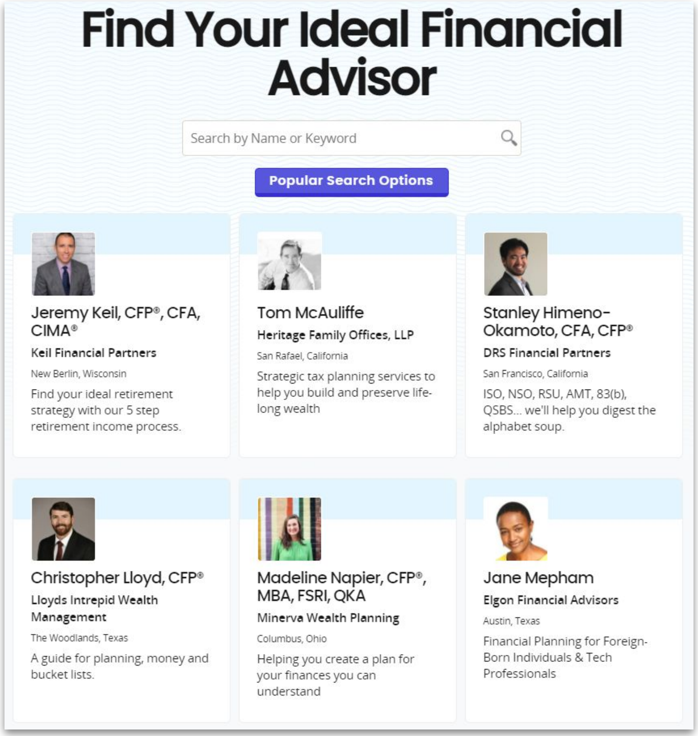
The Wealthtender Financial Advisor Directory makes it easy for people to find advisors in a directory and map view based on popular search options including:

- Professional Designations
- Areas of Specialization
- Location

Consumers can also customize their search using any keyword or phrase to find the right financial advisors for their individual circumstances.

Your directory listing helps people find you at precisely the right time when they're preparing to hire a financial advisor.

View Financial Advisor Directory



Financial Advisor Benefits Directory

Local Advisor Guides

View Wealthtender Local Guides

Creating Awareness

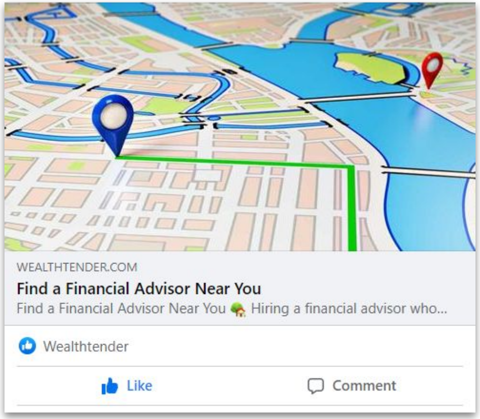
Attract New Clients Who Live **In Your Area**

📍 Financial advisors on Wealthtender are featured in a Local Advisor Guide where consumers learn the benefits of hiring financial advisors nearby.

Each guide includes an interactive map displaying the location of advisors in the area. *Growth and Elite plan subscribers may be listed in up to 2 and 4 additional local guides, respectively.*

🌎 **Do You Work with Clients Virtually?**

Get featured in the Wealthtender Guide to Virtual Financial Advisors.



Financial Advisor Benefits Directory

Gain Recognition in Your **Areas of Focus**

Financial Advisor Benefits Directory

Advisor Specialty Search

View an Advisor Specialty Search Page

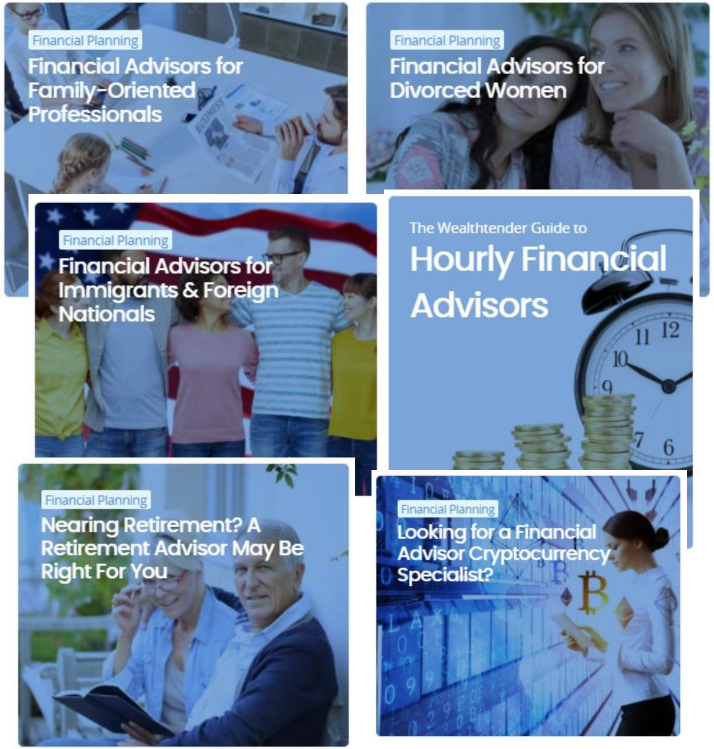
Creating Awareness

The world has changed. Consumers know where they live is only one factor to consider when choosing a financial advisor since many advisors can work with them virtually no matter their zip code.

Wealthtender is the first advisor discovery platform to make searching for an advisor based on their areas of specialization **as easy as finding a movie on Netflix**.

Thousands of people visiting wealthtender.com each month can scroll up and down to view different **categories of advisor specialization** and swipe left or right to find articles and guides featuring financial advisors on Wealthtender within each category who may be a good fit for their individual needs.

*Financial advisors on Wealthtender featured in these resources gain **increased visibility** with consumers and enjoy **multiple benefits** as discussed in the next section.*



Benefit From Our Reach On Social Media

Financial Advisor Benefits Directory

Social Media **Amplification**

Creating Awareness

💬 Every week, financial advisors on a Growth or Elite subscription plan can take advantage of their **social media amplification** benefit to get help promoting an article they've written or podcast episode they've hosted or been featured in.

Through our social media amplification service, advisors gain increased visibility when people share their content or visit their website to view content of interest.

Advisors also enjoy SEO benefits as search engines like Google view the sharing of content across social media platforms as a quality signal that can lead to higher rankings in search results.

To access this benefit, advisors can submit content weekly in the private Wealthtender community or sign up for a weekly email reminder by asking yourfriends@wealthtender.com.

Submit Your Content
Login Required

Your Website Content is Featured in the **WISE** Search Engine

Financial Advisor Benefits Directory

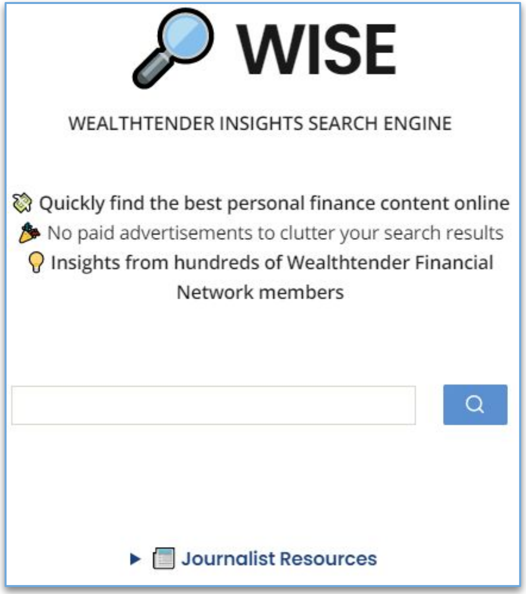
The Wealthtender Insights Search Engine

Creating Awareness

The **Wealthtender Insights Search Engine (WISE)** is the first **ad-free** search engine dedicated exclusively to personal finance. With curated content from hundreds of financial professionals and educators in the Wealthtender community, you'll quickly find what you're looking for.

When you join Wealthtender, the content of your website becomes discoverable by consumers who use WISE to learn more about their finances and to get answers to their money questions.

Journalists, freelance writers and finance blog owners may also link to your content or contact you if they're looking for a quote.



✍ Do You Write Articles for Your Website or Media Outlets?

Use the **WISE Search Engine** to find reference sources for your articles written by members of our community and let us know when you do. We'll help promote your content and drive more traffic to your content.

Get Discovered in the Financial **Podcast** Directory

Financial Advisor Benefits Directory

Promote Your Podcast

Creating Awareness

Do you host your own podcast?

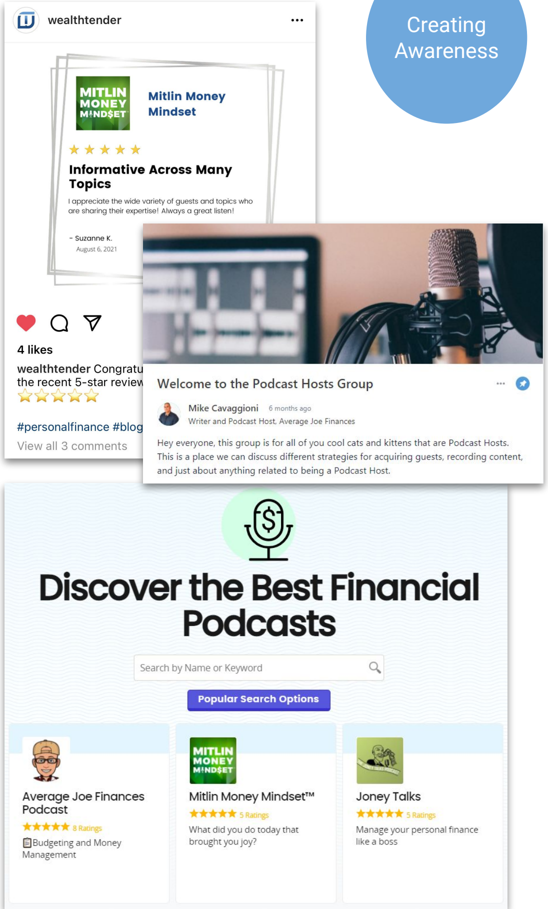
List your podcast in the Wealthtender Financial Podcast Directory to attract new listeners and grow your audience.

Collect reviews from your listeners and we'll promote your podcast across social media accounts reaching thousands of people.

And join the Podcast Hosts Group in our private online community to chat with other podcasters and learn useful tips, including what's working well on topics from production to promotion.

Get to Know Financial Advisors with Podcasts on Wealthtender

- Mitlin Money Mindset (Larry Sprung)
- Take Back Retirement (Stephanie McCullough)
- ADHD Money Talk (David DeWitt)



Modern Advisor Marketing ™

*The middle of the modern advisor marketing funnel includes **building authority** in your areas of specialization with your clients… and also with leading search engines.*

Section 2 Highlights

- Credential Recognition
- Content Boost 🚀
- Get Quoted on Wealthtender
- Syndication on Wealthtender
- Get Quoted in the Media
- Guest Post on Wealthtender
- Get Featured in Guides
- Large Employer Q&A Series

Building Authority

Benefits to Gain Recognition & Strengthen SEO

Gain Recognition for Your **Professional Designations**

Financial Advisor Benefits Directory

Credential Recognition

View Professional Designation Articles

Building **Authority**

Whether you're a Certified Financial Planner or you've earned other professional designations, Wealthtender ensures you receive the recognition you deserve for your credentials.

By featuring you in articles published on Wealthtender educating people on the benefits of hiring an advisor with credentials relevant to their financial planning needs, you're gaining visibility with prospects who could be a good fit to work with you.

Each article is optimized for search engines with regular promotion on social media and through our network of financial influencers.

📝 **Do you hold a financial designation we haven't written about yet?**

We've published articles on over 30 leading professional designations held by financial advisors. If we haven't written about a designation you've earned, email yourfriends@wealthtender.com and we'll prioritize the article to be published within a few weeks.

Get Quoted **on Wealthtender**

Build **Authority** and Strengthen Your **SEO**

With hundreds of articles published on Wealthtender spanning a broad range of personal finance topics, financial advisors enjoy opportunities to be quoted in areas specific to their niche or important to their practice.

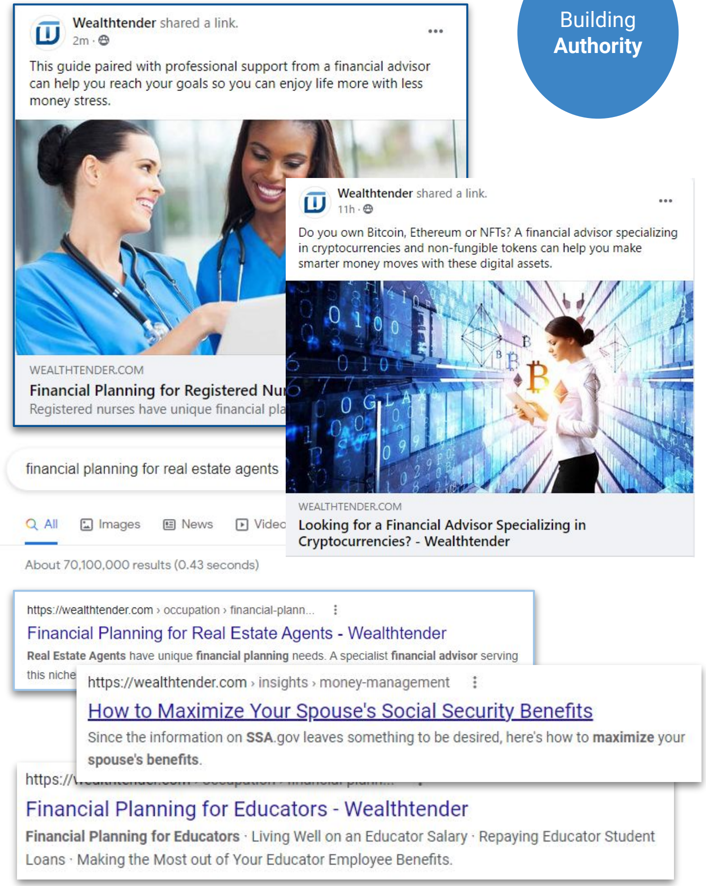
Callout quotes build authority and generate interest to attract your ideal clients at exactly the right time. And you'll gain SEO benefits that help you rank higher in search results.

Learn More & Sign Up
Login Required

Make the Most of this Highly Shareable Content:

- Create social media posts highlighting your callout quote
- Preview the article in your newsletter for clients and prospects
- Add the article to your 'media mentions' page
- Syndicate the article on your own website (ask us how)
- Share the article with COIs in your niche and local reporters

Building **Authority**



Financial Advisor Benefits Directory

Establish Your **Voice** and **Be Heard**

Financial Advisor Benefits Directory

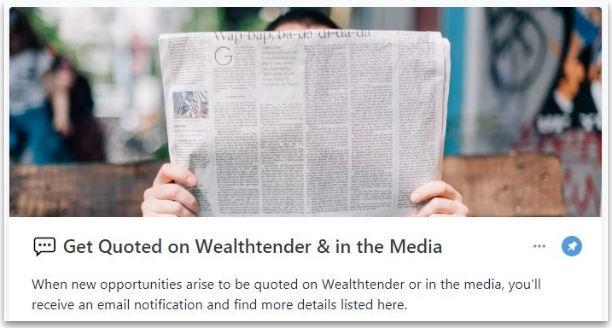
Get Quoted **in the Media**

Learn More & Sign Up
Login Required

Building **Authority**

Getting quoted in major publications and popular websites is an effective way to build authority, strengthen your reputation, and boost your SEO to rank higher in online search results.

Financial advisors who sign up for a Wealthtender Growth or Elite subscription plan enjoy exclusive opportunities to gain national media recognition on sites like MSN.com, hundreds of newspapers nationwide through Associated Press syndication, and visibility across personal finance websites in the Wealthtender Financial Network. **See Who's Getting Quoted** 👀



🔔 Get Instant Email Notifications for New Quote Opportunities

Since reporters operate under tight deadlines, it's important to respond promptly to their requests to increase your chances of being considered and included in their articles.

If you're interested in building authority in the media and boosting your SEO, email yourfriends@wealthtender.com to sign up for instant alerts in your inbox when new opportunities arise.

Get Listed in Resources Related to Your Areas of **Specialization** and Attract Your **Ideal Clients**

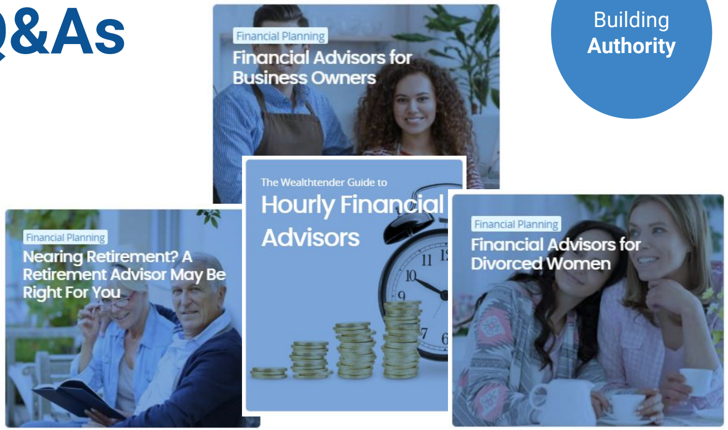
Get Featured in **Guides and Q&As**

Building **Authority**

Whether you're focused on growing within a specific niche or simply interested in strengthening your online reputation, being featured in Wealthtender Guides and Q&A resources is a great way to build authority and boost your SEO.

When you're featured, you're gaining optimal visibility to attract your ideal clients at exactly the right time.

Financial advisors on Wealthtender with a Growth or Elite subscription plan receive an onboarding email with an invitation to be included in up to 4 and 6 resources, respectively, relevant to your niche or areas of specialization you're looking to grow.



Financial Advisor Benefits Directory

Attract Clients from **Large Employers**

Building **Authority**

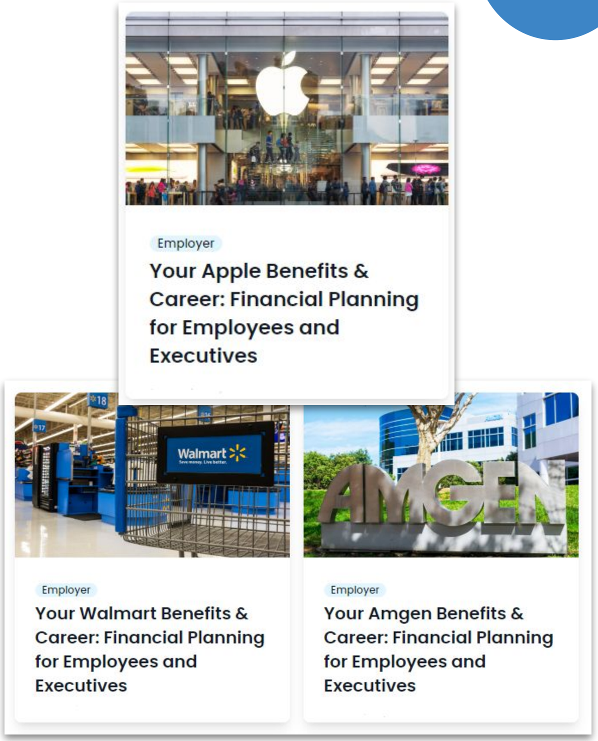
Gain Recognition as a Large Employer Specialist

If you currently serve clients who work for a large employer, you've likely gained valuable insights reviewing their benefits and compensation packages to create financial plans tailored to their unique circumstances. We want to help you attract more clients employed at these firms.

The Wealthtender Major Employer Q&A series showcases advisors in our community who have experience helping employees and executives at large employers, including Fortune 500 companies and beyond.

Financial advisors on Wealthtender with a Growth or Elite subscription plan receive an onboarding email with an invitation to participate in a major employer Q&A resource. Or simply email yourfriends@wealthtender.com for more information.

View Employer Q&A Examples



Financial Advisor Benefits Directory

Boost Your **SEO**, Build **Authority** & **Awareness**

Financial Advisor Benefits Directory

Guest Post on Wealthtender

Building **Authority**

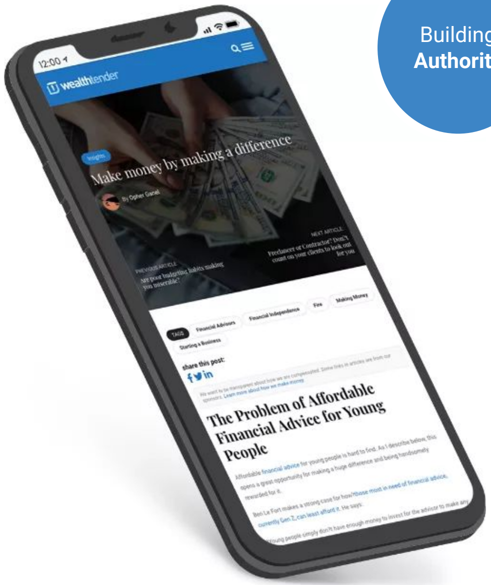
Writing a guest post published on wealthtender.com is a powerful way for financial advisors to increase visibility and attract prospective clients while building trust and authority that strengthens SEO.

Financial advisors on Wealthtender with an Elite subscription plan are welcome to submit up to 4 guest posts each year (Growth plan subscribers can submit up to 2 guest posts each year.)

Additional guest posting benefits include:

- Byline, headshot and brief bio linked to your Wealthtender profile
- Up to 3 backlinks to relevant pages on your website
- Social media promotion (Twitter, Facebook, Instagram, and/or LinkedIn)
- Priority consideration for Wealthtender newsletter inclusion

Submit a Guest Post
Login Required



📝 **Guest Post Requirements:**

- Original content, not previously published
- Personal finance topics; Consumer audience
- 1200 words minimum
- Pre-submission grammar and spell check
- Subject to final approval by Wealthtender

Extend the Reach of Original Articles on Your Website

Financial Advisor Benefits Directory

Syndicate Your Content on Wealthtender

Building **Authority**

Content syndication (republishing) is a smart and effective way for financial advisors with original articles on their website to reach a larger audience while retaining SEO benefits.

When a financial advisor's article is syndicated on wealthtender.com, Wealthtender tags the article to let search engines know the original version of the article is on the advisor's website. This helps ensure when the article is displayed in Google search results, it's the version published on the advisor's website, not the syndicated copy on wealthtender.com.

Financial advisors on Wealthtender with an Elite subscription plan are welcome to submit up to 4 articles for syndication each year, capped at 2 per month. (Growth plan subscribers can submit up to 2 articles for syndication annually.)

Additional content syndication benefits include:

- Byline, headshot and brief bio linked to your Wealthtender profile
- Up to 3 backlinks to relevant pages on your website
- Social media promotion (Twitter, Facebook, Instagram, and/or LinkedIn)
- Priority consideration for Wealthtender newsletter inclusion

Submit Content for Syndication
Login Required

📝 **Content Syndication Requirements:**

- Original content hosted on advisor's website
- Personal finance topics; Consumer audience
- 1000 words minimum
- Pre-submission grammar and spell check
- Subject to final approval by Wealthtender

Use *Content Boost* 🚀 to Grow Your Business

Building **Authority**

Turn Your Website into a Powerful Marketing Tool

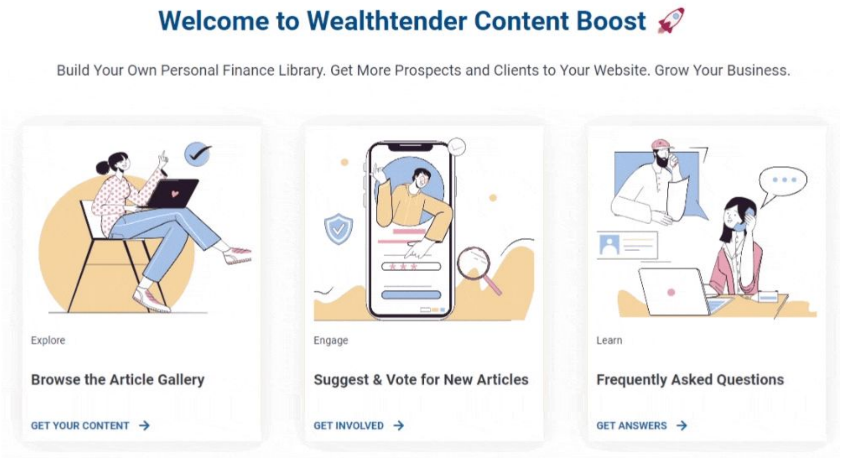
We're excited to announce the launch of Wealthtender Content Boost to help you turn your website into a powerful marketing tool to attract more prospects while driving deeper engagement with your current clients.

Wealthtender Content Boost features a library of more than 100 articles covering a broad range of personal finance topics available for you to create or supplement the content library on your website. New articles will be added each month.

Wealthtender Content Boost is available to Elite plan subscribers as an available benefit at no additional cost.

For a preview of Wealthtender Content Boost and to learn more, please click the big blue button below to take a look around, check out the FAQs.

Visit Wealthtender Content Boost 🚀



Financial Advisor Benefits Directory

Modern Advisor Marketing ™

The new SEC Marketing rule opens the door to more opportunities to ***grow trust and generate interest*** *among people interested in working with a financial advisor.*

Section 3 Highlights

- Getting Started with Reviews
- Certified Advisor Reviews™
- Certified Advisor Review Widgets
- Review Aggregation
- Your QR Code Opportunities
- Specialist Badges & Ratings

Growing Trust & Generating Interest

Benefits to Turn Prospects into Warm Leads

Wealthtender is empowering financial advisors and wealth management firms with industry-first tools and resources to compliantly grow their business.


CISION
PR Newswire

Wealthtender Launches Industry's First Financial Advisor Review Platform Designed to be Fully Compliant with New SEC Marketing Rule

NEWS PROVIDED BY
Wealthtender, Inc. →
May 04, 2021, 07:45 ET

HOUSTON, May 4, 2021 /PRNewswire/ -- After 60 years of regulatory prohibition, financial advisors now have a powerful new tool to grow their business thanks to the Securities and Exchange Commission (SEC) and the launch of Certified Advisor Reviews™ from Wealthtender.

Nerd's Eye View KITCES

"... Wealthtender is launching a more centralized "Advisor Reviews" platform, where advisors can **sign up for a page on Wealthtender** that **centralizes all** of their Google, Yelp, and other third-party website reviews, and repackages them as "**Certified Advisor Reviews**" (reviewed by Wealthtender) for which the advisor can add a Reviews badge to their website (linking to their Wealthtender profile).

...Nonetheless, the reality is that because testimonials have long been recognized as **such a powerful marketing tool** – including in financial services, where for decades they were only banned because they were deemed *too* influential and at risk for abuse! – it seems **inevitable that client testimonials will soon become a core part of advisor marketing**. The only question is how, exactly, advisory firms will find it best to collect and share them for the (right) prospects to see?"

– Michael Kitces at Nerd's Eye View
The Latest in Financial #AdvisorTech (June 2021)

Do Your Online Reviews Matter?

Y-E-S.

Financial Advisor Benefits Directory

Getting Started with Ratings & Reviews

Growing **Trust**

The world has changed. The SEC took action. *Now, it's your turn.*

After 60 years of regulatory prohibition, financial advisors can finally join other trust-based professions where online reviews have become a proven and powerful way to attract new clients.

Wealthtender is the first financial advisor online review platform designed to be fully compliant with the new SEC Marketing rule and we're excited to help you get started when you're ready. (Read Press Release)

We know it could take some time before you're able to move forward depending upon your registration status at federal and state levels, and when your compliance team is ready to give you the green light. When you're ready, we'll be here to help you get started.

In this section, you'll learn why reviews matter and how **Certified Advisor Reviews™** from Wealthtender are designed to help you compliantly collect testimonials and endorsements, attract new clients and grow your business.

COMPLIANCE WEEK

FOR THE WELL-INFORMED CHIEF COMPLIANCE OFFICER AND AUDIT EXECUTIVE

New SEC marketing rule offers opportunities, compliance challenges

"This is an opportunity for the industry to unlock the voices of investors who are satisfied with their adviser."

September 28, 2021 >>

"This is an opportunity for the industry to unlock the voices of investors who are satisfied with their adviser."

Brian Thorp, Founder and CEO, Wealthtender

Get the Playbook and Learn How to Compliantly Grow with Online Reviews

Financial Advisor Benefits Directory

Getting Started with Ratings & Reviews

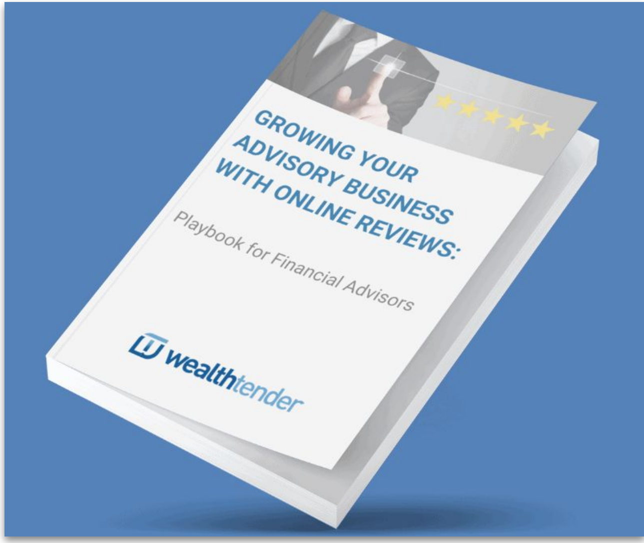
Ready to Get Started with Online Reviews? We wrote the book. ***Literally.***

Wealthtender proudly introduces the first playbook for financial advisors and wealth management firms interested in getting started with online reviews to grow their business.

This 50-page playbook covers the following topics in-depth:

- Getting Started with Online Reviews
- Preparing Your Online Review Policies & Procedures
- Crafting Your Disclosures
- Choosing the Right Online Review Platforms
- Asking for Reviews
- Promoting Your Practice with Online Reviews
- Appendix: Templates and Resources

Learn why online reviews matter and how financial advisors can turn online reviews into a powerful source of digital referrals, just as other trust-based professionals like doctors and lawyers have been doing successfully for years.



Download the Playbook

Getting Started with **Certified Advisor Reviews**

Financial Advisor Benefits Directory

Introducing **Certified Advisor Reviews™**

Certified Advisor Reviews™ from Wealthtender help consumers make smarter hiring decisions when choosing a financial advisor. And financial advisors benefit from an SEC compliant online review platform to grow their business.

With Certified Advisor Reviews™, you can:

- Confidently ask your clients (and acquaintances) for reviews
- Promote your reviews to attract new clients
- Import and certify reviews from *Google* & all other platforms
- Strengthen your online reputation with clients and prospects
- Establish your trustworthiness with *Google* and *Bing*
- Demonstrate your consumers' interests first mindset
- Unlock reviews trapped on sites like *Google* and *Yelp*
- Turn Certified Advisor Reviews on (or off) at any time

Certified Advisor Reviews FAQs

How Certified Advisor Reviews™ Work:

Financial advisors who join Wealthtender and choose to turn on the reviews feature can invite clients (and non-clients) to write reviews on their Wealthtender profile page.

Before each review is publicly displayed, financial advisors agree to provide Wealthtender with important information about their relationship with the reviewer consistent with SEC Marketing rule disclosure expectations (within 5 business days).

Upon receipt of the requested information from the financial advisor (within 1 business day), Wealthtender completes the certification process and publishes the review with the Certified Advisor Review™ mark formatted for compliance with the SEC Marketing rule.

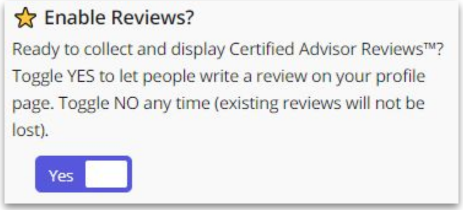
Financial advisors on Wealthtender are authorized to display the Certified Advisor Reviews™ badge on their website, social media accounts and elsewhere, demonstrating their commitment to helping consumers make smarter hiring decisions.

Getting Started with **Certified Advisor Reviews**

Financial Advisor Benefits Directory

Turning On Certified Advisor Reviews™

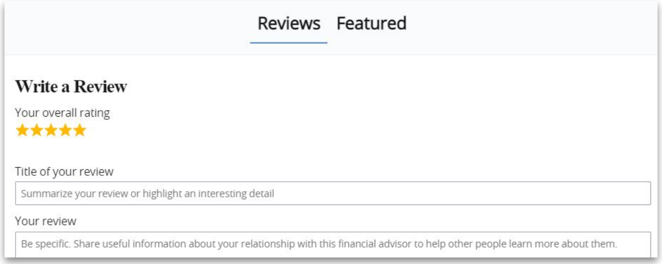
By default, your Wealthtender profile page is set for Certified Advisor Reviews turned **off**. You can easily toggle this feature on (or off again) anytime by logging in to your profile page and viewing the *Edit Profile* screen under the *General tab*.



Collecting Reviews on Your Wealthtender Profile Page

With *Enable Reviews* toggled to **Yes**, click the *Submit* button. You'll see a new **Reviews** tab appear just below your profile.

Click on **Write a Review** to preview the form.



✅ ***Now you're ready to collect and display your Certified Advisor Reviews!***

From *Reviews* to *Certified Advisor Reviews*™

Getting Started with **Certified Advisor Reviews**

When a review is submitted on your Wealthtender profile page, it is **NOT** immediately displayed.

Here's how we turn your *review* into a *Certified Advisor Review* compliant with the SEC Marketing rule:

1. You're Notified by Email	2. Complete Certification Form	3. Submit Form to Wealthtender
Open your email from Wealthtender with details of the submitted review and a link to the brief review certification form.	Complete the brief certification form within 3 - 5 business days to confirm disclosure details (e.g. is the reviewer a client, compensated, etc.)	Wealthtender will append the review with your disclosure details within 1 business day to complete the certification process.

Congratulations! Your review is now a Certified Advisor Review **publicly displayed on your profile page**.

Financial advisors on Wealthtender who remain in good standing are authorized to display the Certified Advisor Reviews™ badge on their website, email signature and social media accounts.

With the Certified Advisor Reviews™ badge displayed on your website and linked to your Wealthtender profile page, you're building trust with the next generation of investors and your future clients.

Certified Advisor Reviews FAQs

Financial Advisor Benefits Directory

Your Certified Advisor Review **Widgets**

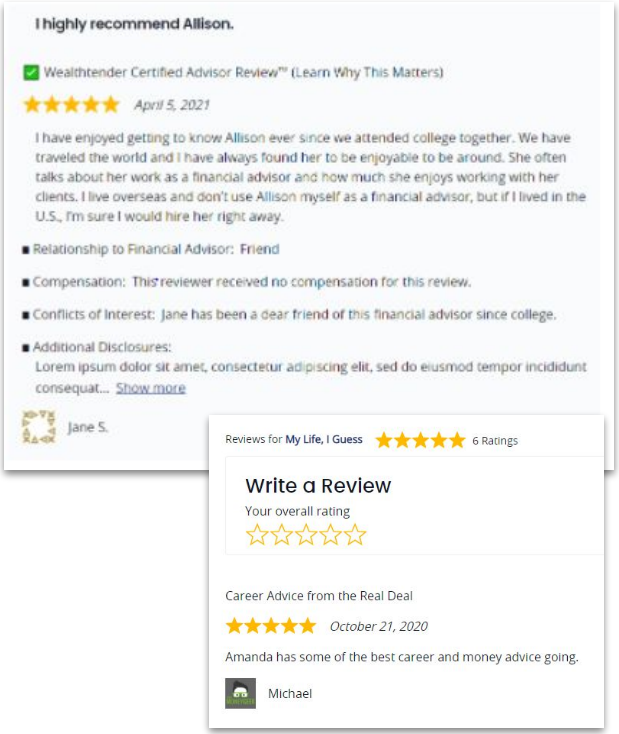
Collect and Display Certified Advisor Reviews **on Your Website**

Financial Advisor Benefits Directory

Financial advisors who turn on the Ceritifed Advisor Reviews feature can **collect and display reviews on their own website**, in addition to their Wealthtender profile page.

With **widgets** designed by Wealthtender to be fully compliant with the SEC Marketing rule, you won't have to worry about custom website development costs or delays to get started.

What is a widget? Good question! A widget is simply a standardized block of instructions used by websites to embed and display content from other websites. This means it's easy to update your website to include the widget with just a few clicks.



💻 Whether you manage your own website, rely on a developer or third party website provider, simply email yourfriends@wealthtender.com and we'll get you set up right away.

Unlock Reviews Trapped on Platforms like Google And Yelp

Review **Aggregation**

Financial advisors are not permitted by the SEC to directly promote or refer prospects to their reviews on non-compliant platforms like Google and Yelp which don't support required advertising disclosures.

Fortunately, with a reviewer's permission, you can republish these reviews on SEC-compliant platforms like Wealthtender. This is known as review aggregation.

By aggregating reviews on Wealthtender, financial advisors can turn reviews otherwise off-limits into powerful testimonials to proactively attract new clients.

And you're also increasing the likelihood of reaching prospects closer to making a hiring decision when they read your reviews on Wealthtender.

*"While any positive **unsolicited** reviews you receive on Google and Yelp offer SEO benefits and increased visibility among consumers who find them, you'll unlock substantially greater value by employing **review aggregation**."*

✅ Converting reviews from sites like Yelp and Google into Certified Advisor Reviews™ on Wealthtender is easy.

Financial advisors submit a short form to Wealthtender linking to the review(s) to be imported and confirming permission from review writer(s). Wealthtender imports the review information and initiates its standard certification process. Imported reviews include additional disclosures to prominently indicate the original review date.

Financial Advisor Benefits Directory

Use Your QR Code to Build Trust with Prospects and Book Intro Meetings

Financial Advisor Benefits Directory

Your **QR Code** Opportunities with **Prospects**

Financial advisors on Wealthtender with a Growth or Elite subscription plan can request a **unique QR code** personalized with their logo and linked to what we like to call a ***mobile, trust-building, prospect to client converter.*** Just think of it as a *mobile lead magnet*.

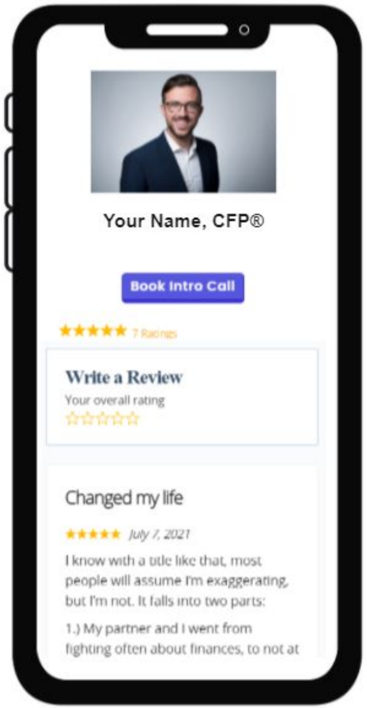
SCAN ME

When prospects scan your QR code with their mobile phone, your Certified Advisor Reviews are displayed along with a button to book time on your calendar. **Here are a few ways to make the most of this feature:**

👩‍🏫 **Seminar Marketing:** Create a flyer with your QR code that seminar attendees can scan to read your reviews before you begin and to easily book an appointment that you can suggest in your closing remarks.

💻 **Webinars:** Since most people watch webinars on a computer, include a QR code they can scan with their mobile phone before the presentation begins and at its conclusion to read your reviews and book an appointment.

➕ Additional ideas include creating **business cards with your QR code** to share with prospects, **postcard mailings** and more. *It's time to get creative!*



Use Your QR Code to **Get More Reviews** from Your Clients

Financial Advisor Benefits Directory

Your **QR Code** Opportunities with **Clients**

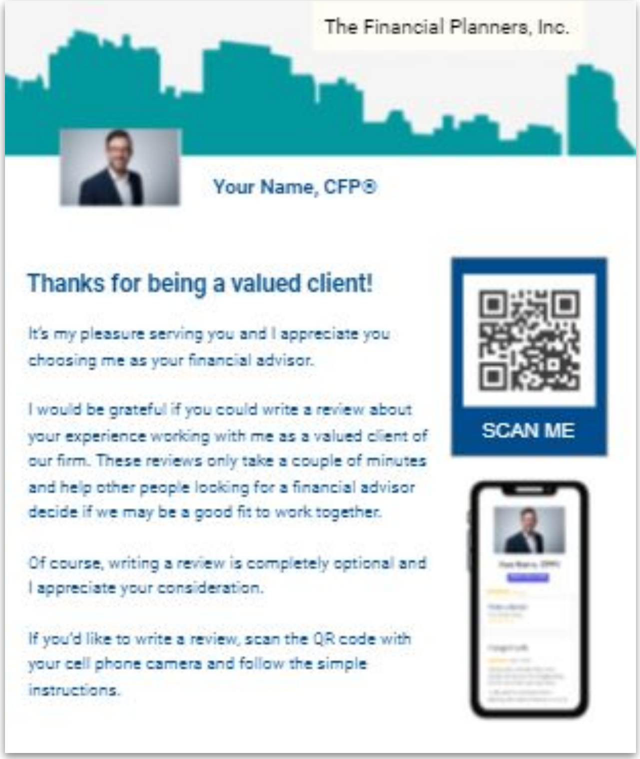
Growing **Trust**

Beyond opportunities to convert cold leads into warm prospects, your unique QR code is also a great way to get more reviews from your clients and people who know you well.

For example, a printed flyer (like the illustration on this page) available in the reception area of your office offers a non-intrusive way to let your clients know you appreciate their business and their consideration to write a review.

With just a quick scan of their cell phone, they can write and submit their review with just a few clicks and a moment of their time.

💡 Business cards printed with your QR code on one side also offer an easy way to ask acquaintances who know you well to write a review when the perfect moment to ask presents itself.



Increase Trust by Earning Recognition as a **Specialist**

Financial Advisor Benefits Directory

Earn Specialist Badges & Ratings

Growing **Trust**

Financial advisors on Wealthtender with a Growth or Elite subscription plan are eligible to **earn badges and ratings** for their specialized knowledge in areas important to serving clients with unique needs.

Advisors must have **3 or more** of the following to be **eligible for consideration**:

- A professional designation with relevance to the area of specialization
- Three 5-Star Certified Advisor Reviews from clients with commentary addressing the area of specialization[1]
- One 5-Star Certified Advisor Review from a *non-client* with commentary addressing the area of specialization[1]
- At least one guest post published on Wealthtender demonstrating a high level of competence in the relevant area of specialization
- Multiple articles authored by advisor on their website or third party sites demonstrating their knowledge in the relevant area of specialization

Please Note: Eligibility for consideration does not constitute an award. On a calendar quarterly basis, Wealthtender will accept applications from eligible advisors (and/or unilaterally invite eligible advisors in its sole discretion) to complete attestation forms confirming their eligibility before announcing awards. Eligibility requirements are subject to change at Wealthtender's discretion without notice.

wealthtender

[1] *Advisors unable to collect Certified Advisor Reviews due to regulatory and/or firm constraints can alternatively submit client and non-client commentary privately to Wealthtender to satisfy these requirements.*

Modern Advisor Marketing ™

By joining the Wealthtender Community, you'll ***expand your network*** *and meet other advisors, coaches and financial influencers who can help you grow your business.*

Section 4 Highlights

- Join the Private Community
- Join Interest Groups
- Member Deals & Discounts
- Hire Freelance Writers

Expand Your Network

Wealthtender Community Networking Benefits

Expand Your Professional Network

Financial Advisor Benefits Directory

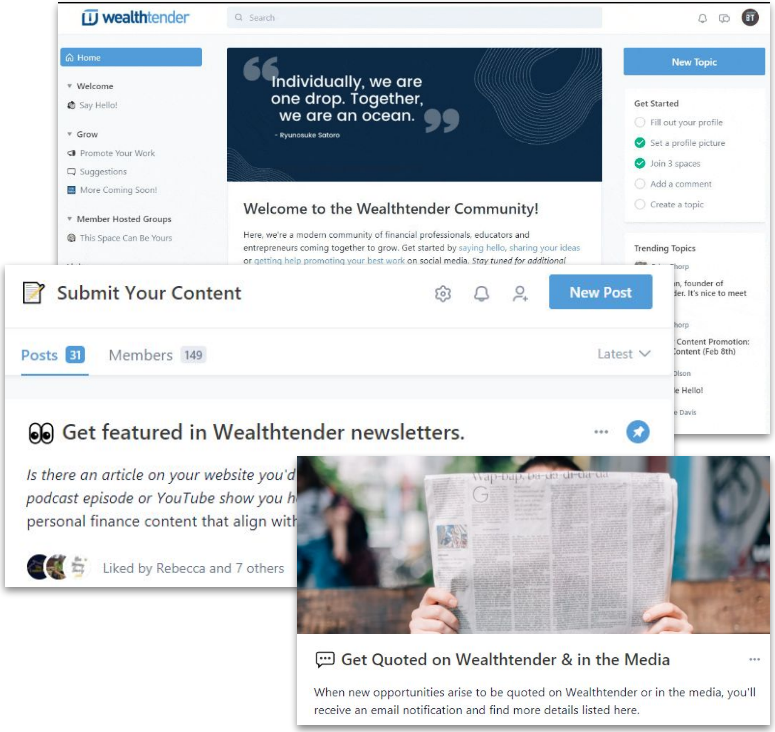
Join the Private Wealthtender Community

Expand Your Network

Financial advisors are invited to join the private Wealthtender community with financial professionals and educators interested in helping each other grow.

Financial advisors also enjoy access to areas within the community where opportunities are posted exclusively for financial advisors with an Elite or Growth subscription plan.

As the Wealthtender community grows, advisors gain new referral opportunities from financial coaches, counselors, finance blog and podcast owners whose audiences may be an ideal fit to work with an advisor.



Enter the Wealthtender Community
Login Required

Connect with Community Members Who Share Your Interests

Financial Advisor Benefits Directory

Expand Your Network

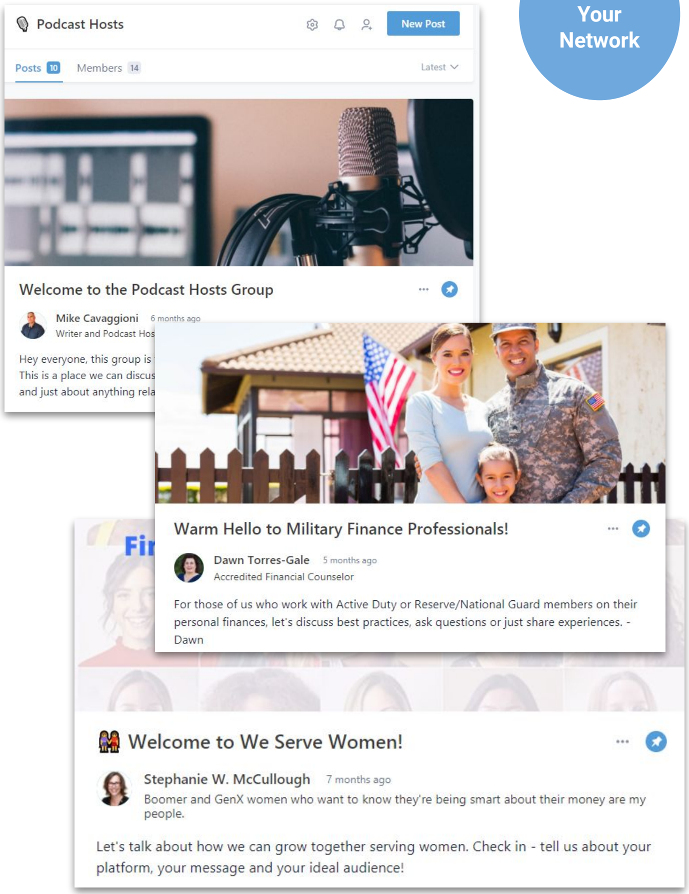
Join Interest Groups

The Wealthtender community includes a diverse mix of financial professionals and educators who each bring their unique life experiences and perspectives to conversations taking place in interest groups.

If you're interested in joining an **existing interest group**, simply click to join and you can jump right in. You can also choose your notification preferences to receive an email for each new post, a daily summary or none at all.

Are you interested in **starting your own interest group**? Send an email to yourfriends@wealthtender.com and we'll get your new group set up right away. We'll also help you promote the group to members of the Wealthtender community who may be interested in joining.

And if you'd simply like to see an interest group started, but prefer not to be named an official moderator of the group, that's fine, too. Let us know your idea and we can get the group started and invite others to join.



Discover New Tools & Resources to Grow Your Business

Financial Advisor Benefits Directory

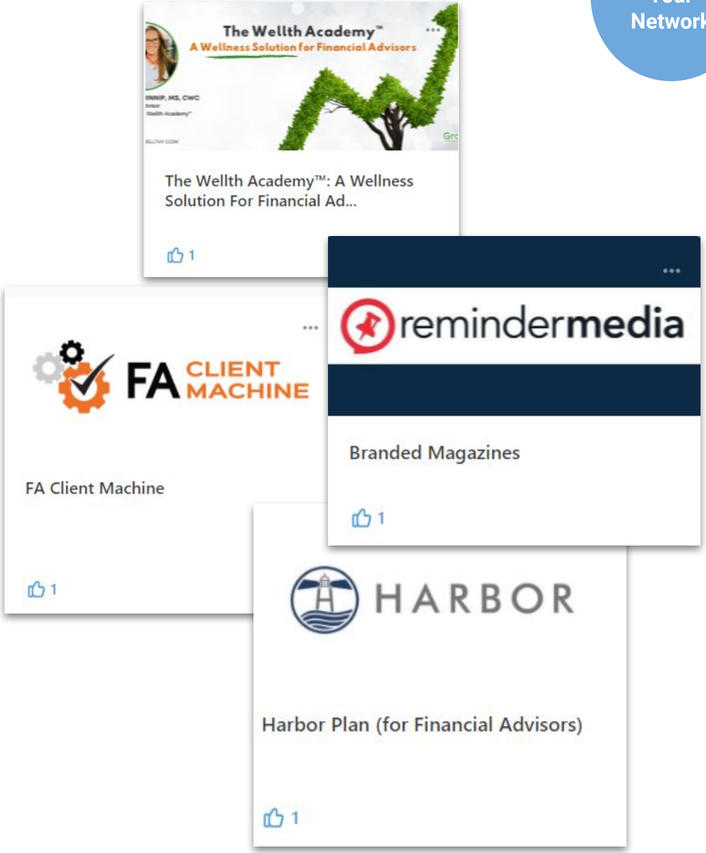
Member Deals & Discounts

Expand Your Network

Take advantage of discounts available to Wealthtender Community members for popular tools and resources to help with practice management and growing your business.

Discover newer companies with offerings not yet well known that could give you a competitive edge in your market.

View Member Deals & Discounts
Login Required



Hire Finance Freelance Writers

Expand Your Network

Create High Quality Content to Grow Traffic to Your Website and Boost Your SEO

Are you interested in adding original content to your website to attract your ideal clients, increase organic traffic from search engines like Google and boost your SEO?

The highly respected personal finance freelance writers featured on Wealthtender are ready to help with affordable rates and tremendous experience optimizing articles to rank well for topics important to your business.

Many of our featured freelance writers also have successful personal finance blogs and social media followings which could benefit your business if you're interested in their help promoting your content.

And most are happy to be a named author on the article or remain in the background as a ghostwriter depending upon your needs.

View Finance Freelance Writer Directory

Financial Advisor Benefits Directory

Modern
Advisor
Marketing ™

*If your firm includes two or more financial advisors, we offer additional **growth solutions** to increase brand awareness and strengthen your online reputation.*

Section 5 Highlights

Advisory Firm Growth Solutions

Benefits for Wealth Management Firms

Advisory Firm Growth Solutions

Increase Visibility for Your Firm and Collect Testimonials Compliantly

Your **Firm** Profile Page

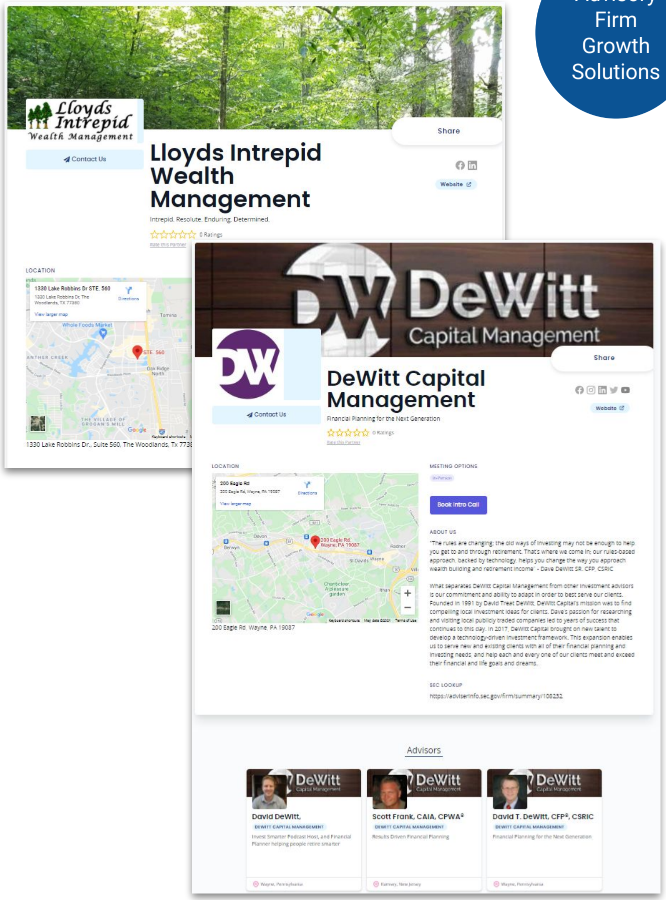
Does your firm have multiple financial advisors?

When two or more financial advisors from the same firm join Wealthtender, we'll create a **profile page for your firm** upon your request.

Your firm profile page offers an additional way for prospective clients to learn what's unique about your services and team, with quick access to individual profile pages for each affiliated advisor.

You can also **collect and display testimonials** for your firm in compliance with SEC Marketing rule requirements.

To request creation of your firm profile page, simply email yourfriends@wealthtender.com and we'll get it set up right away.



Financial Advisor Benefits Directory

Use Custom Widgets from Wealthtender to Meet the Unique Needs of Your Firm

Financial Advisor Benefits Directory

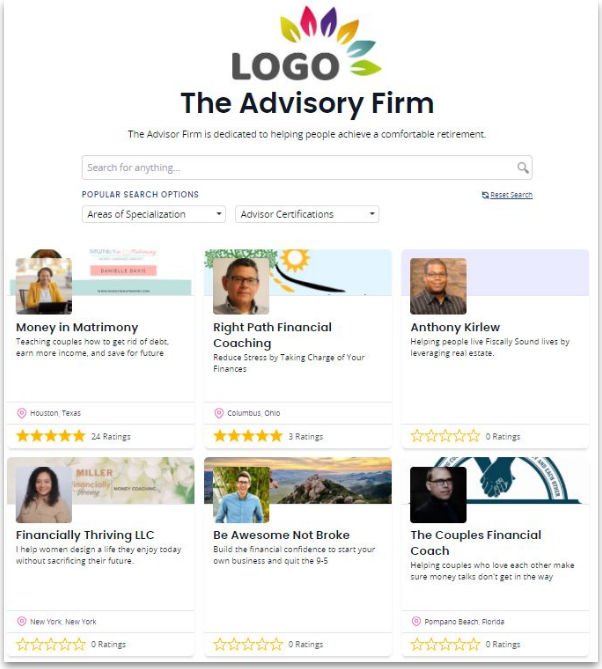
White Label Solutions

Advisory Firm Growth Solutions

Whether you're looking for a fully **compliant plug & play solution** to showcase your advisors and their Certified Advisor Reviews on your website, or you're interested in customized widgets without incurring development costs, white label solutions from Wealthtender may be ideal for your needs.

With **widgets designed for easy installation** on your own website or hosted for you on wealthtender.com, we're happy to discuss ways we can help you achieve your goals.

Simply email yourfriends@wealthtender.com when you're ready to explore ways we can work with you.



Creating **Awareness**

Building **Authority**

Growing **Trust**

Generating **Interest**

Your Online **Reputation**

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Advisor
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Join Wealthtender Today

Get Started