

How a \$17B RIA Uses Client Reviews to Get Found & Grow AUM

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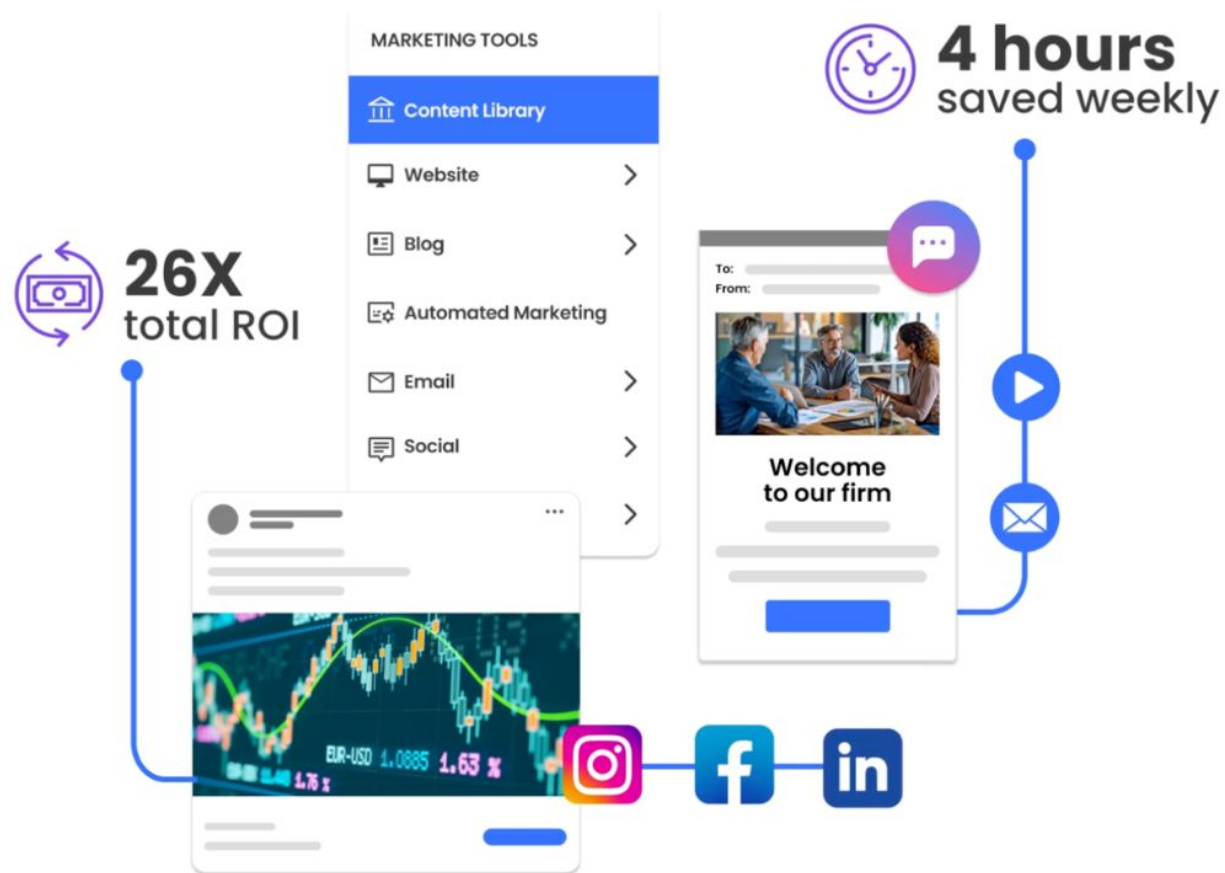
Director of Product, FMG



Your partner for what's next in advisor marketing.

FMG helps you keep pace with how clients discover and choose advisors, with the flexibility to build one connected platform or use only the solutions that fit your business.

See How it Works



One Platform For Every Part of Your Marketing

The FMG product suite.

01	CONTENT & ENGAGEMENT Marketing Suite	Keeps you visible and consistent. Email, social, content, and automations, all compliance-ready.
02	DIGITAL PRESENCE Website Suite	The foundation. Where prospects validate, referrals land, and AI search surfaces your expertise.
03	CLIENT TEXTING Messaging Suite	Lets you text clients compliantly. Built for financial advisors, modern new mobile app.
04	MANAGED EXECUTION Do It For Me	Removes the execution burden. A dedicated Concierge runs marketing month after month.
05	TRUST & SIGNALS Testimonials	Compliant reviews and social proof, built into the platform and surfaced on websites and Google.
06	CONTENT MARKETPLACE Institutional Intelligence	Carrier, asset manager, and association expertise published in the your voice.
07	PARTNER PROGRAM FMG Connect	Integrates with all your preferred solutions saving you time and improving execution.

One login · Built in compliance workflow · CRM integrations · Built only for financial advisors

A few housekeeping notes

1

This session is being recorded

A replay will be available afterward if you need to step away or want to revisit it.

2

We'll share the slides

The presentation deck will be sent out along with the replay link.

3

Plus a look at FMG Testimonials

We'll include an overview of FMG's testimonials solution for anyone who wants to explore it further.

Your Speakers:



Michelle Winkles

CMO, Mission Wealth
Management



Samantha Russell

Chief Evangelist, FMG



Andrew Johnson

Director of Product, FMG

Guidance and clarity *for* life's pivotal moments.

[REQUEST AN INTRODUCTION](#)

We deliver proactive, comprehensive, and caring financial advice to individuals and families, business owners, retirees, family offices, career professionals, independent women, tech executives, next-generation investors, and nonprofits.



WHAT WE'LL COVER

If you've been sitting on the testimonial opportunity because it felt too risky, this session is for you.

1

Turn reviews into proof

Provable, compliant, and working for you and your advisors across search, AI, and referrals.

Hear Directly From Our Ann Arbor, MI Clients

★★★★★

Tom K. | 03/20/2026

As for our advisor shinaola atoro, he has been extremely client focused - relatable, attentive, responsive and an extremely active listener. If there is any area for improvement, I think the client portal could be more client useful. Currently, the portal seems more a placeholder for snapshot reports/scorecard. I wish it were more interactive. A tool for clients use on an ongoing basis, to analyze "what ifs"

★★★★★

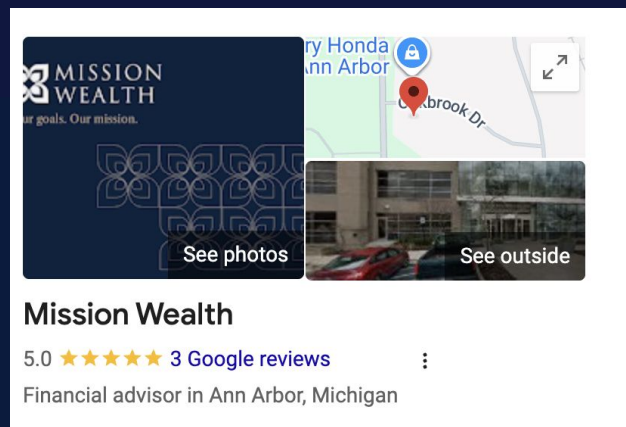
Janice R. | 03/04/2026

Shinaola and the team have been very thorough in answering our questions and have brought very good advice for improving our financials. Estate planning, social security, and taxes are some of the highlights.

2

Maximize impact

Across websites & Google Business Profiles to make testimonials a real marketing tool

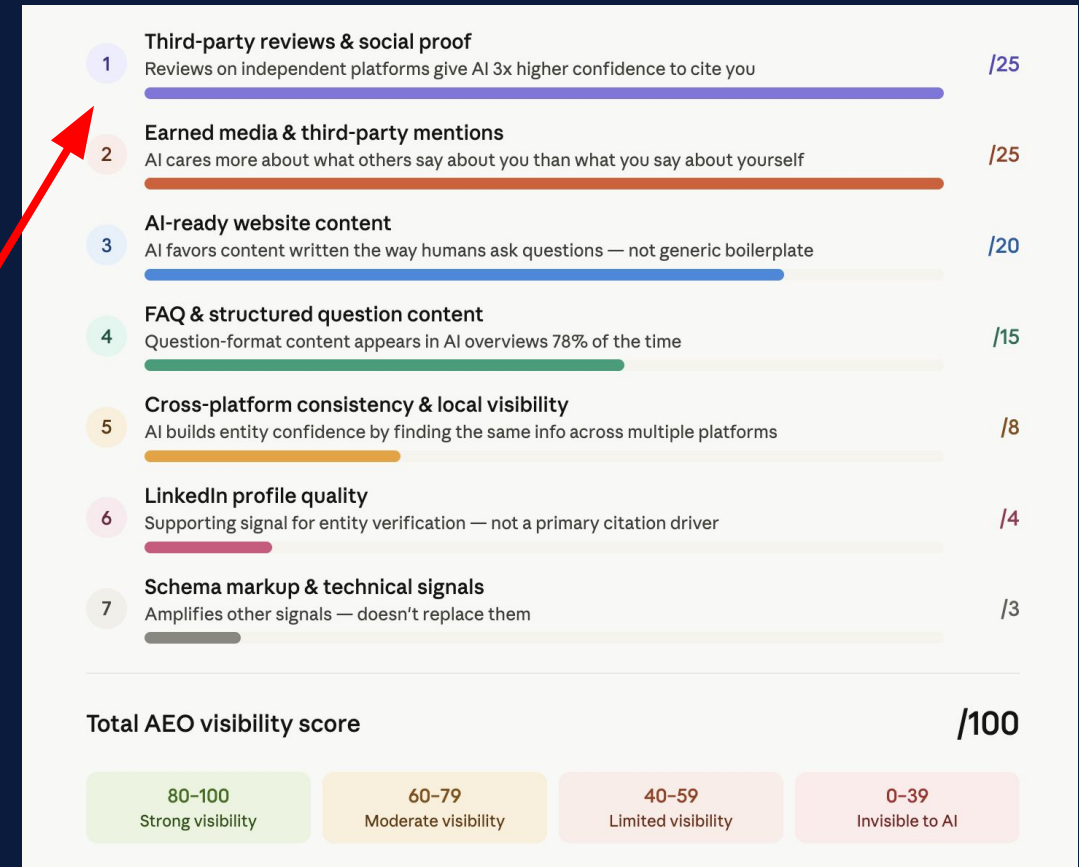


In 2021

The SEC cleared client testimonials for RIAs

But most of you watching this still aren't collecting them.

That's a big problem, because client reviews are now one of the strongest signals determining whether AI tools and search engines recommend a firm to a prospect at all.



WHY NOW

What other people say
about you now carries
more weight than
anything you say
about yourself.

AI tools and search engines increasingly
treat client reviews as the trust signal

The graphic compares three sources of information:

- What you say:** A grey circle icon for 'Your website'. It shows the text 'We're trusted and client-first.' with a grey highlight. Below it, a grey box says 'Every site says this.' and a red pill-shaped button says 'Unverified'.
- What they say:** A green circle icon for 'Client reviews'. It shows a quote 'She talked me off a ledge in March 2020.' in a green box. Below it, it says '87 reviews · 4.9★' and a green pill-shaped button says 'Verifiable'.
- What AI repeats:** A blue circle icon for 'The AI answer'. It shows the text 'Clients say she is communicative and always available.' in a blue box. Below it, it says 'Not your website copy.' and a green pill-shaped button says 'This gets cited'.

At the bottom, a quote reads: *What others say about you now outranks anything you say about yourself.*

WHAT MISSION WEALTH BUILT

MISSION  WEALTH® **255**

testimonials collected

 **205**

testimonials approved

 **48**

locations represented

 **4.98**

Average rating

How? They worked with FMG Testimonials on a system to collect reviews at scale — and put them where they generate growth

FMG TESTIMONIAL WORKFLOW

One workflow. Managed centrally.

Marketing owns execution. Compliance owns the rules. The process runs in one system.



Outreach

Marketing sends campaigns to client lists.



Consent

Opt-in is captured and logged.



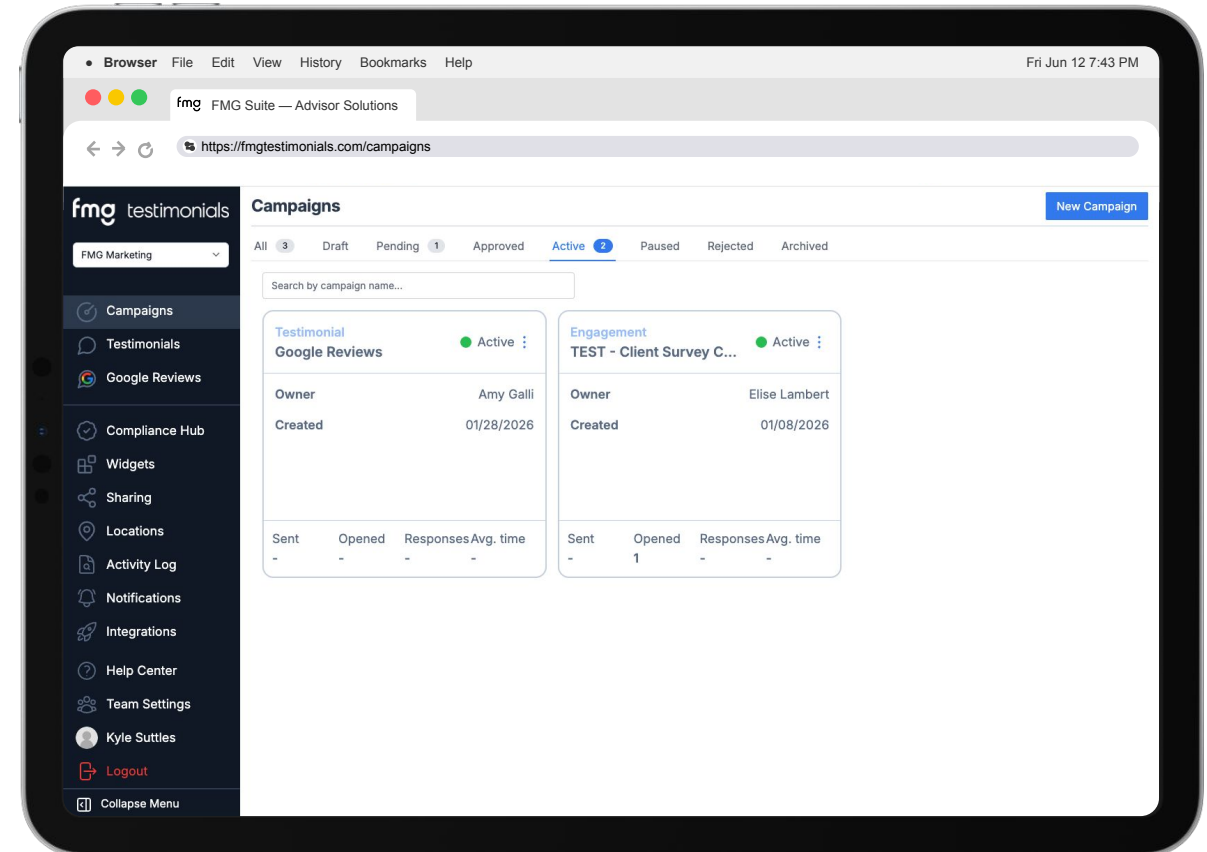
Review

Each submission routes to the home office queue.



Publish

Approved proof goes live on public website and advisor pages.



ENTERPRISE CONTROLS

Branding, data handling, and access are set at the account level, not by individual advisors.



Brand-level identity

Business info, branding, and website set at the account level and applied everywhere.



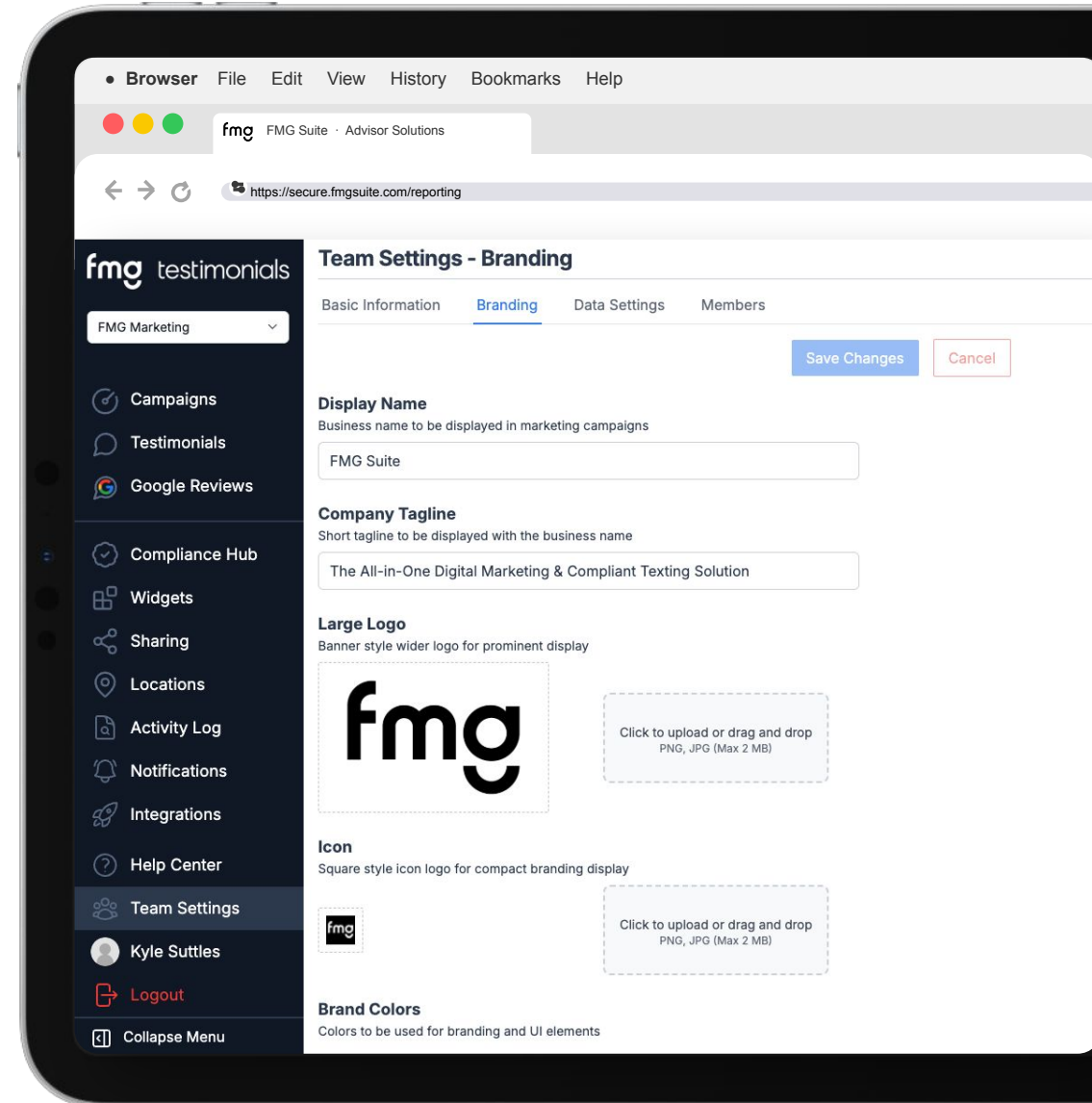
Data settings

How the account's data is configured and handled, controlled in one place.



Member management

Add, remove, and assign roles so the right people have the right access.



WHAT MISSION WEALTH BUILT

How Does Mission Collect the Reviews In a Compliant Way?



- Advisor email signature lines
 - Non-advisor email signature lines
 - Post-client-event thank-you emails
 - Quarterly newsletters
 - Post-webinar/online-event drip campaigns
-
- **KEY FOR COMPLIANCE:** Able to prove in an audit that you are fair and balanced and everyone has access to leave a review.

WHAT MISSION WEALTH BUILT

Strategically Using Testimonials In Your Marketing



WEBSITE: Mission Uses tags to dynamically align testimonials with the most relevant content and audiences

- **Homepage:** Our strongest firm-wide testimonials
- **Location pages:** Testimonials from clients associated with those locations
- **Service pages:** Testimonials describing experiences with specific services, including some longer client stories
- **Who We Serve / ICP pages:** Testimonials aligned with those target audiences
- **Advisor bio pages:** Testimonials from that advisor's own clients appear prominently
- **Leadership bio pages:** Testimonials and credibility markers support AEO/SEO as well as recruiting and M&A
- **Testimonials page:** A centralized experience where visitors can filter testimonials based on what matters most to them

WHAT MISSION WEALTH BUILT

Strategically Using Testimonials In Marketing



SOCIAL MEDIA : Mission turns testimonials into branded social cards for Mission Wealth's LinkedIn and Facebook channels. The posts typically include the testimonial, information about the advisor, and a link to the advisor's bio page. Advisors can then reshare these posts on their own LinkedIn profiles or feature them. We also include the compliance case information within the creative.



Mission Wealth
 4,674 followers
 3d •

Trusted financial guidance means having a strategic partner who understands your goals and works collaboratively across every aspect of your financial life.

“Wes Patton has consistently delivered excellent counsel, strategic direction, and personal investment structure. He is responsive in a very timely manner and does an excellent job at coordinating with my family and tax advisors.”

Partner and Senior Wealth Advisor [Wes Patton MBA, CFP®, MS](#), provides personalized guidance and thoughtful coordination with families and other professional advisors, helping clients navigate complex financial decisions with greater clarity and confidence.

Looking for personalized wealth management and comprehensive financial planning? Connect with Mission Wealth to learn how our advisors can help you build a strategy around your unique goals: <https://lnkd.in/gFJdyA9u>

#MissionWealth #ClientTestimonial #WealthManagement #FinancialPlanning
#DenverFinancialAdvisor #InvestmentManagement

Strategic Guidance, Thoughtfully Coordinated

“
Client Testimonial
 Wes Patton has consistently delivered excellent counsel, strategic direction, and personal investment structure. He is responsive in a very timely manner and does an excellent job at coordinating with my family and tax advisors.
 ★★★★★ - Denver Client
 ”

MISSION  WEALTH

TESTIMONIALS HAVE BEEN RECEIVED BY ACTUAL CURRENT CLIENTS OF MISSION WEALTH MANAGEMENT LP AND REFLECT THE EXPERIENCES OF THOSE WHO HAVE USED OUR SERVICES. HOWEVER, THEY ARE INDIVIDUAL RESULTS, WHICH MAY VARY. NO COMPENSATION HAS BEEN PAID TO ANY CLIENT IN EXCHANGE FOR THE TESTIMONIALS APPEARING ON OUR WEBSITE. MISSION WEALTH IS A REGISTERED INVESTMENT ADVISOR. 0022664 08/20



Wes Patton
 MS, MBA, CFP®
 Partner and Senior Wealth Advisor
 Mission Wealth Management, LP

Questions you've asked!

How do you leverage Google reviews if soliciting clients for them triggers the requirements in the SEC Marketing Rule for testimonials? There are no controls on Google's platform to add disclosures, monitor for content, or archive the reviews. And once we solicit them we become responsible for the compliance of the reviews.

How do we overcome the fear of a bad reviews? what is the best way to handle getting a bad review?

Why are broker dealers so hesitant to allow this?

I'd love to know how to best utilize ai to get our 248 5 star Google reviews working for us there as well. Reviews and testimonials are a big part of my marketing plan but definitely interested to learn more!!!

Interested in learning more about FMG Testimonials?



Scan to connect
with our team and
request a demo!



fmg