

FMG Acquires Testimonial iQ, Will Rebrand as FMG Testimonials

Expanded Platform Will Empower Advisors to Drive Organic Growth with Compliant Testimonials and Answer Engine Optimization

San Diego, CA, February 4, 2026 – FMG, the leading all-in-one marketing platform for wealth management enterprises, financial advisors and insurance professionals, today announced it has acquired Testimonial iQ, an online reputation management platform built specifically for the wealth management industry.

The newly acquired firm will be rebranded as FMG Testimonials to reflect FMG's growing commitment to expanding its platform value and capabilities. The acquisition brings Testimonial iQ's award-winning compliant testimonials, reviews, referrals and client feedback tools directly onto FMG's marketing platform, making it easier for advisors to appear in local and Large Learning Model (LLM) online search results and convert that visibility into organic growth. Testimonial iQ helps advisors collect and manage both client survey-driven testimonials and Google Reviews and seamlessly feature them on their websites with the required disclosures and built-in compliance oversight.

“Organic growth is the defining challenge for wealth management firms today, and FMG is focused on being the industry's organic growth engine,” said Dave Christensen, Chief Executive Officer of FMG. “Our expanded capabilities will help advisors stay visible in AI and local search, earning the trust of potential clients quickly and turning that visibility into organic growth opportunities. The industry has a heightened focus on compliant client communication, and this acquisition is a direct and timely response to the evolving regulatory guidance on testimonials and reviews.”

By combining Testimonial iQ with FMG's SEO tools and Answer Engine Optimization (AEO) functionality – which strengthens content visibility by AI-powered models – firms and advisors will be able to centralize reviews, testimonials and AEO-optimized content on a single platform designed for the next era of AI and answer engine search.

“Gartner's data should be a wakeup call for wealth management firms and advisors: traditional search volume is projected to decline by 25% in 2026 as people shift to AI,^{1,3}” said Susan Theder, Chief Marketing Officer of FMG. “We are already seeing that shift in behavior, daily AI search usage in the U.S. more than doubled over a six-month period in a recent study². This is the new front door. Firms that adapt will earn visibility and trust earlier in the decision journey, firms that do not will lose ground to those who do. AI models tend to reward what helps investors validate credibility quickly, strong reviews, compliant testimonials, and clear FAQs. When those signals are in place, the leads that come through are often more qualified and can convert at four to five times the rate of traditional SEO traffic⁴. That makes a compliant review and testimonial strategy a competitive necessity, not a nice to have.”

Key Benefits of the Combined FMG Platform

- Integrate Testimonial iQ review and testimonial workflows into FMG websites, landing pages, email and social media tools, so advisors can publish compliant testimonials and reviews with one click across channels.

- Connect Google Review generation and local search insights from Testimonial iQ with FMG's local listing capabilities to help advisors monitor and improve their map and local rankings.
- Feed review and testimonial data into FMG's upcoming AEO Optimization solution, which will provide monitoring, alerts and reporting on how advisors are showing up across AI, GEO and answer engine searches.
- Extend Testimonial iQ's survey, referral and analytics capabilities so enterprises can see patterns in client sentiment, identify advocates and link online reputation to pipeline and revenue outcomes.

The rebranded **FMG Testimonials** will continue to be available as a standalone product, with the same compliance-first workflows, controls and processes firms rely on today, or purchased as part of FMG's integrated marketing solutions.

This naming transition reflects FMG's commitment to making testimonials and online reputation an important part of advisor marketing, while maintaining the purpose-built approach that has made Testimonial iQ trusted by compliance teams and enterprises across the industry.

Connecting Compliant Social Proof to AEO and AI Search

FMG has been investing in AEO to help advisors stay visible as AI platforms, AI overviews and zero-click search change how investors seek information. FMG websites automatically apply schema markup to FAQ sections, generate and update sitemaps and provide local listing tools, enabling advisors to present clear, structured answers and accurate business information wherever prospects search.

Testimonial iQ complements this strategy by helping firms turn client experiences into structured, compliant social proof. The platform makes it easy to collect reviews, publish those on their websites, run client surveys, and automate outreach, all with the disclosures, workflows and reporting that compliance teams require.

Recent FMG research and education have highlighted that AI tools increasingly rely on reviews and testimonials as third-party validation when recommending advisors, and that only a small percentage of advisors currently utilize public testimonials. This gives early adopters a meaningful visibility advantage in AI search results.

"We started Testimonial iQ with a simple mission: help financial advisors turn happy clients into new business without creating compliance headaches. The recent SEC risk alert highlights just how important it is to have a tailor-made solution," said Andrew Johnson, CEO and Co-Founder of Testimonial iQ. "Joining FMG allows us to deliver on that mission at scale. FMG is the marketing engine behind tens of thousands of advisors and many of the industry's leading enterprises. Together, we can embed reviews, testimonials and referrals into the broader advisor marketing workflow, so that every email, website and campaign is backed by authentic client voices and are fully aligned with SEC and FINRA guidance."

The transaction was finalized in December; financial terms of the transaction were not disclosed.

About FMG

FMG is the leading all-in-one marketing platform for financial advisors, insurance professionals, and enterprises, empowering them to scale compliant, client-centric marketing that drives

organic growth. Trusted by more than 80,000 advisors who collectively reach over 45 million investors, FMG is consistently ranked number one in market share and customer satisfaction in the T3 Software Survey Report and has been recognized by WealthManagement.com as Best Marketing Automation Platform.

An independent study by a major consulting practice found that enterprises using FMG's marketing platform achieved an average return on investment of 26 times, reported Net Promoter Scores nearly 4x higher than the industry average, and saw measurable lifts in lead conversion, revenue growth, client retention, and time saved on marketing tasks.

Through its intuitive, centralized platform, FMG enables users to manage websites, email, social media, texting, events, blogs, videos, and more from one place, staying ahead of evolving trends like AI-driven search and AEO.

For more information, visit <https://fmgsuite.com/>.

About Testimonial iQ

Testimonial iQ helps financial advisors grow by nurturing their online reputation. Built from the ground up for SEC and FINRA-regulated wealth management firms, the platform streamlines the process of generating Google Reviews, gathering and publishing testimonials, running surveys, and analyzing client feedback, with the necessary disclosures and compliance oversight built in.

Nearly seventy percent of firms using Testimonial iQ for Google Reviews have reached the top three in local search results, helping advisors improve visibility where prospects are most likely to start their search. Testimonial iQ has been recognized with multiple industry awards, including *WealthManagement's* Top Compliance Tech recognition, and is headquartered in Denver, Colorado.

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Sources:

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2. <https://www.highervisibility.com/seo/learn/how-people-search>
3. Wells Fargo via Yahoo Finance: ChatGPT Continues Steady Gains in Search
4. [RankScience: AI Search vs. Google Traffic Data](#)