

The Trust Stack: Issue #1

Dear Financial Adviser,

It would be rude to keep adviser insights to ourselves.

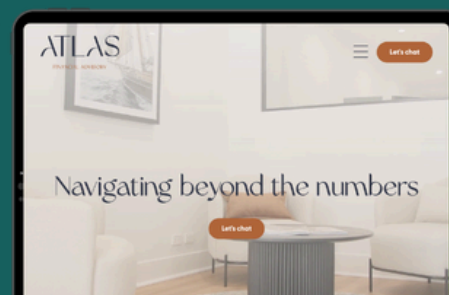
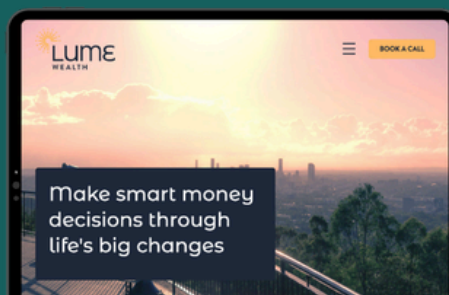
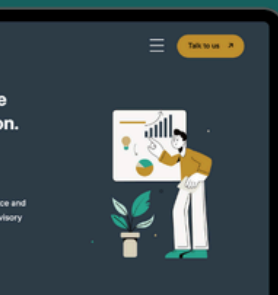
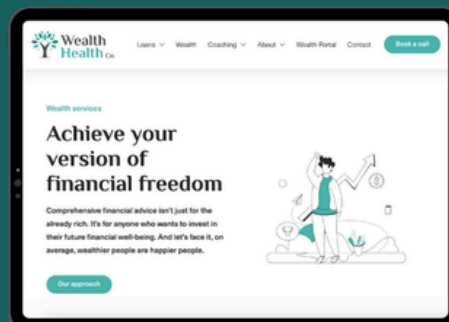
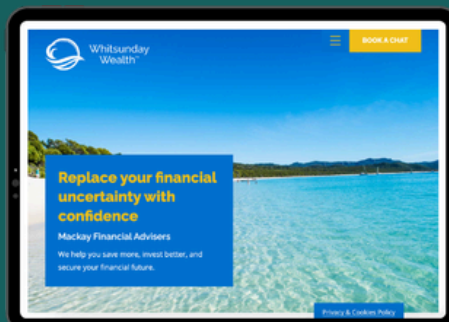
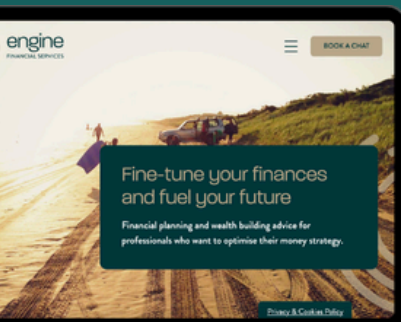
Through our work at Simply Advice Websites, Pat and I speak daily with financial advisers about websites, messaging, and standing out online. The same questions keep surfacing. What builds trust? What makes a site feel distinct? What helps the right people say yes?

The Trust Stack is where we share those insights. Practical observations from years of creating adviser sites, and strategies you can apply at your own pace.

Stack snapshot

Scroll ahead to what speaks most to you, or read it all.

1. **Trust issues:** Testimonials are key to building trust.
2. **Missed media:** Booking tools debate and Pat's latest poddy interview.
3. **Latest launch:** Seedli.com.au goes live!
4. **Integration win:** Website enquiries sync directly with Fin365.
5. **Worth stealing:** A free tool for compressing high-quality images.



Trust issues

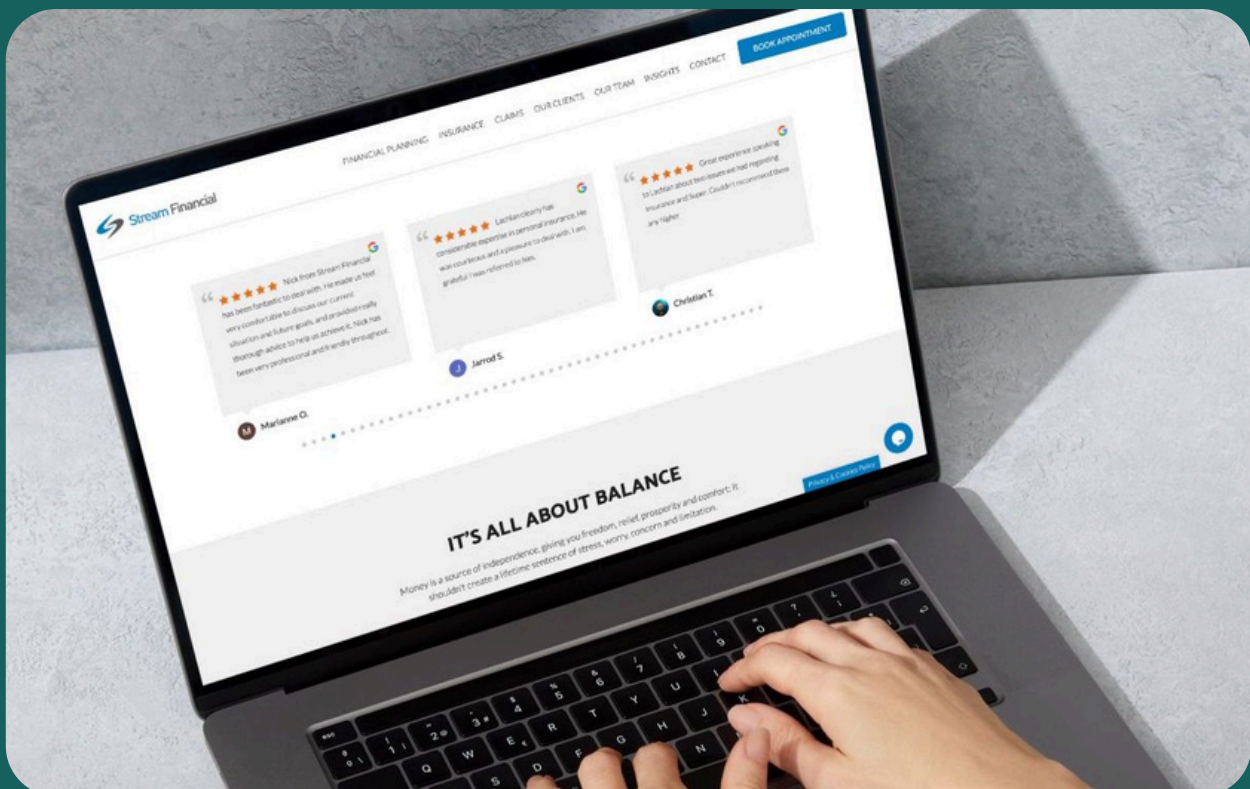
In financial advice, we all know trust matters. And when prospects are comparing their options, what's your best tool?

Client testimonials are key to showing that you deliver real results before you even speak. To make them worth their weight, you need to:

- Share **stories** that reflect relatable client experiences
- Highlight **outcomes** that resonate with the people you want to work with
- Place them where prospects are already **deciding** (think: website pages, social media posts, email campaigns, discovery presentations)

When used effectively, testimonials help leads see themselves in your work and feel confident to take the next step.

Learn how to collect, structure, and display testimonials that build trust and grow your business in [our article](#).



Integration win

Most advisers already live inside Microsoft 365. That makes integration the real opportunity.

We've worked closely with the awesome team at Fin365 to integrate website enquiries directly into Microsoft Dynamics, right where adviser data already lives and gets used every day.

Each enquiry flows directly into Dynamics without manual handling, creating a clean starting point for follow-ups and record-keeping from the moment a prospect reaches out.

This setup also enables Microsoft Power Automate workflows to run quietly in the background, triggering actions, updating records, and reducing admin so advisers can stay focused on their clients.



Fin365



Power Automate

Missed media

On LinkedIn

- [Calendly vs Microsoft Bookings](#): We know MS Bookings is tempting because it's included, but is it the best booking tool for advisers?

On a podcast

- [Challenge the Standard in Financial Advice](#): Pat recently joined Nathan Fradley and Jordan Vaka to chat about gaps in adviser numbers, business ownership, red lines, and practice must-dos.

Latest launch

[Seedli.com.au](https://seedli.com.au)

Congratulations to Alex McMillan and Venetia Ridge at Seedli. Their new website features new pun-filled messaging, photography, booking pages, triage forms, client questionnaires, Google Reviews, events functionality, referral partner pages, FAQs, and more!

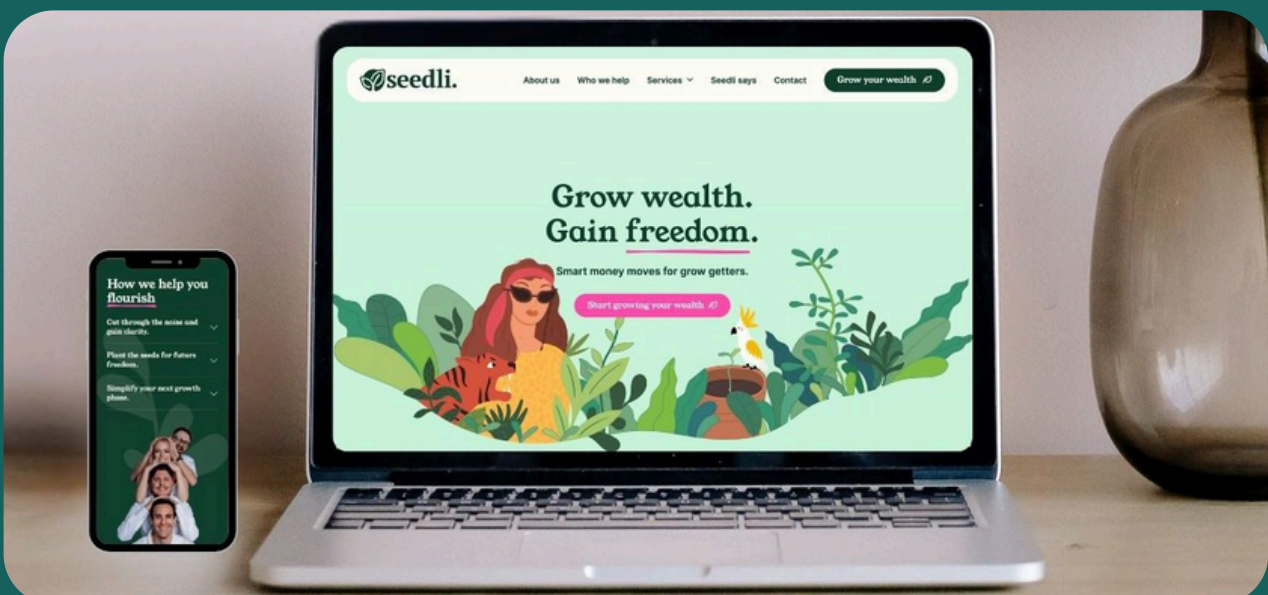


"Jacqueline and the wider SAW team were fantastic to deal with. No question of mine was too trivial or annoying. The feedback and guidance provided was a major help in delivering a website our practice can be proud of for many years to come."

Alex, Managing Director

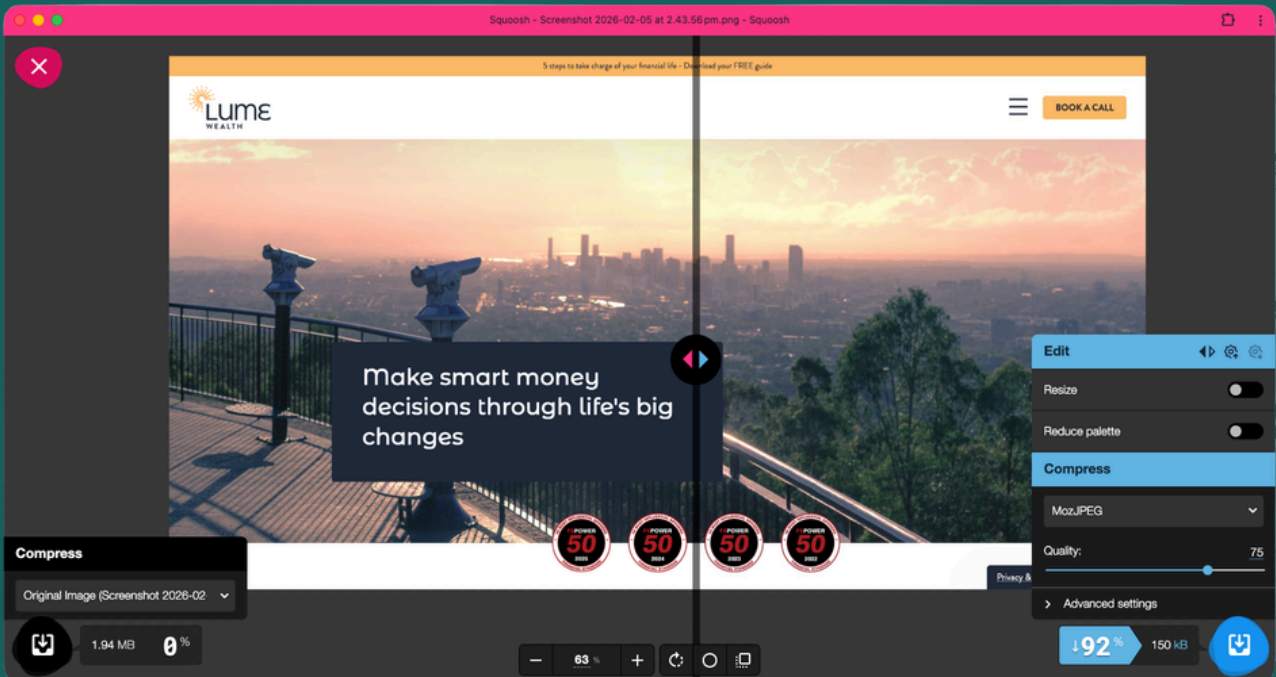
"Wow, what a world of difference this website is, Jacqueline! It's feeling very us! Thank you for your push and hard work! From our side, Santa has come early."

Venetia, Senior Adviser



Worth stealing

Want to reduce image file sizes without impacting their quality? [Squoosh](#) is a free image compression tool. We tested it against Photoshop and found it compresses images far more effectively.



Until next time

If you know someone who would genuinely value this, feel free to pass it on so they can [subscribe](#) below.

Here's to building more trust with your clients,
Jacqueline Barton and Patrick Flynn



Sign me up for more insights

