Simply ADVICE WEBSITES

The Trust Stack: Issue #2

Dear Financial Adviser,

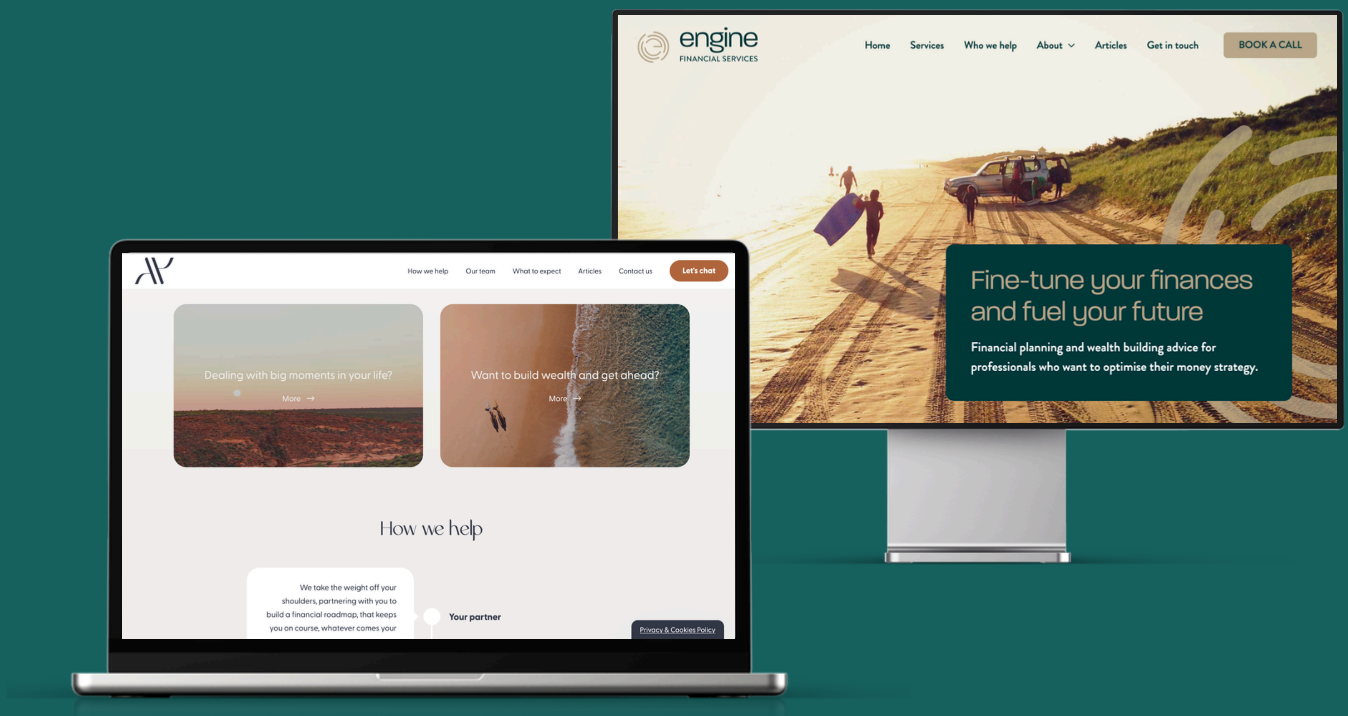
Your prospective clients are doing their research before they consider contacting you. They're reading your reviews, checking your website, and forming an opinion. This issue is about making sure what they find actually reflects how good you are.

If you're new here, this newsletter is where Pat Flynn and I share practical observations from years of creating financial service websites. We teach you strategies that you can apply at your own pace.

Stack snapshot

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

1. **Trust issues:** Referral partners as key to new business.
2. **Top tactic:** Speed matters when it comes to Google Reviews.
3. **Latest launch:** Phase 3 Retirement Solutions goes live!
4. **Integration win:** Website questionnaires sync directly with Monday.com



Trust issues

Referral partners drive some of the highest-quality growth in advice businesses.

A referred prospect arrives with trust already established. They know why they've been sent, and they're actively considering next steps. That moment matters. If they land on your generic homepage, you haven't maximised the opportunity.

A referral partner landing page gives referred clients a more intentional first impression. One that recognises the relationship, reflects shared values, and speaks directly to their situation.

Used well, these pages help you:

- Create a stronger first impression for referred prospects
- Reinforce the credibility of the referral relationship
- Tailor your message to the right type of client
- Encourage action while confidence is high

It's a practical change that meaningfully improves referral outcomes.

Learn how to create high-trust referral partner landing pages in our article below.

Referral partner landing pages

Top tip

Your prospective clients are reading your Google Reviews before they decide to speak with you. That part you probably know.

What's less obvious: responding to those reviews is one of the easiest local SEO wins available to you. Google rewards businesses that actively engage on its platform, and replying promptly is a direct signal that your practice is active and attentive.

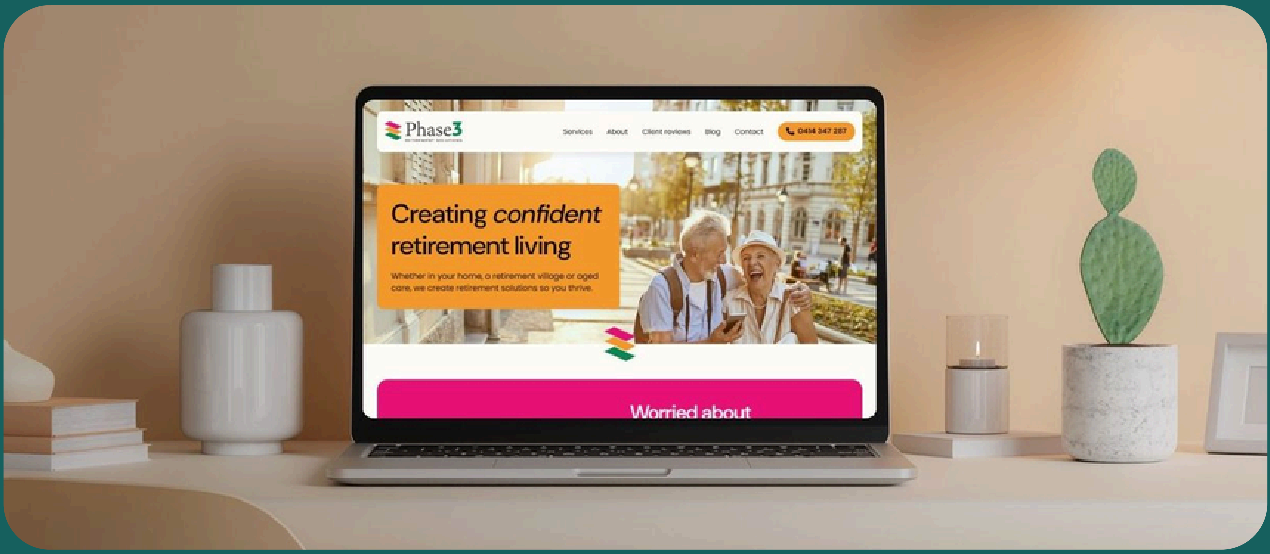
A thoughtful response doesn't need to be long. It just needs to be genuine. Show appreciation, reinforce the trust you've already built, and communicate to both Google and prospective clients that you take your client relationships seriously.

If you're an adviser not responding to reviews, you're leaving credibility and search visibility on the table.

Latest launch

[phase3rs.com.au]
Phase 3 Retirement Solution's Peter Donovan was left high and dry by his previous web developer, so we stepped in to modernise his site.

Working solely with retirement and aged care clients, Peter wanted a colourful and image-heavy site. Beneficially, our partnership with his licensee, Lifespan Financial Planning, means we distribute blog posts to his site each week, and Peter doesn't need to lift a finger.



"I couldn't be happier with the service and outcome I got from Jacqueline. She's a gem, and more practices should use her.

From minute one, she helped me, a tech dumbo, redevelop my website. She worked hard and collaboratively to launch a professional, compliant website with many great features and regular updates through her partnership with my licensee, Lifespan. Reach out to Jacqueline, who offers great professionalism and value for money.

I can't recommend Simply Advice Websites higher as they are now a valuable business partner."

Peter Donovan, Director and Financial Adviser

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Integration win

Do you use Monday.com? If so, you should have it connected directly to your website so every enquiry, intake form, and client update flows straight into your existing workspace. Forget manual data entry and enjoy automation.

- When a prospective client fills in your contact form, a new item is automatically created in your Monday infrastructure. Workflows can begin before you've even seen the notification.
- Pre-session questionnaire responses from ongoing clients update their Monday record in real time, so your board always reflects where each client relationship stands.

If your site and Monday aren't talking to each other, you're managing the gap manually, and that's time better spent on your clients.

monday.com GRAVITY

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