

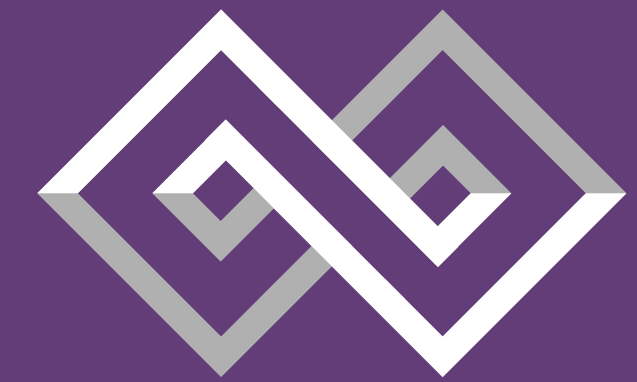


Z E P H Y R

KEY ELEMENTS OF A  
**GREAT RIA WEBSITE**



PRESENTED BY: MICHAEL REYNOLDS

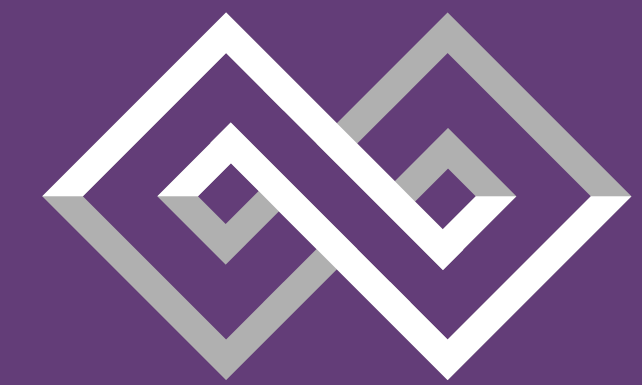


Z E P H Y R

## MICHAEL REYNOLDS

- Co-founder at Zephyr
- Cellist
- Sushi connoisseur
- Tennis/pickleball player
- Star Trek nerd
- RIA owner





Z E P H Y R

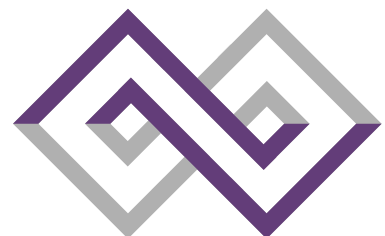


## **BRITTANY NEAL**

- Marketing Coordinator
- Website builder & marketer
- Human/dog mom
- Loves yoga and coffee

# Key Elements

- Clear messaging.
- Simplicity.
- Evaluation aides.
- Pricing.
- High-quality photography.
- Clear call(s) to action (CTA).
- Insights.
- Accessibility.
- Security.
- Speed.







## Clear Messaging

- Be bold and clear about who you serve.
- Avoid vague statements and “hedges”.
- Embrace your niche.

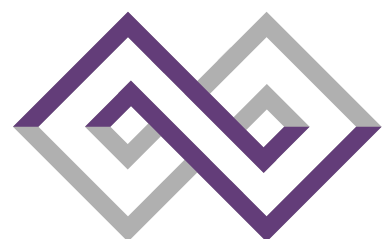




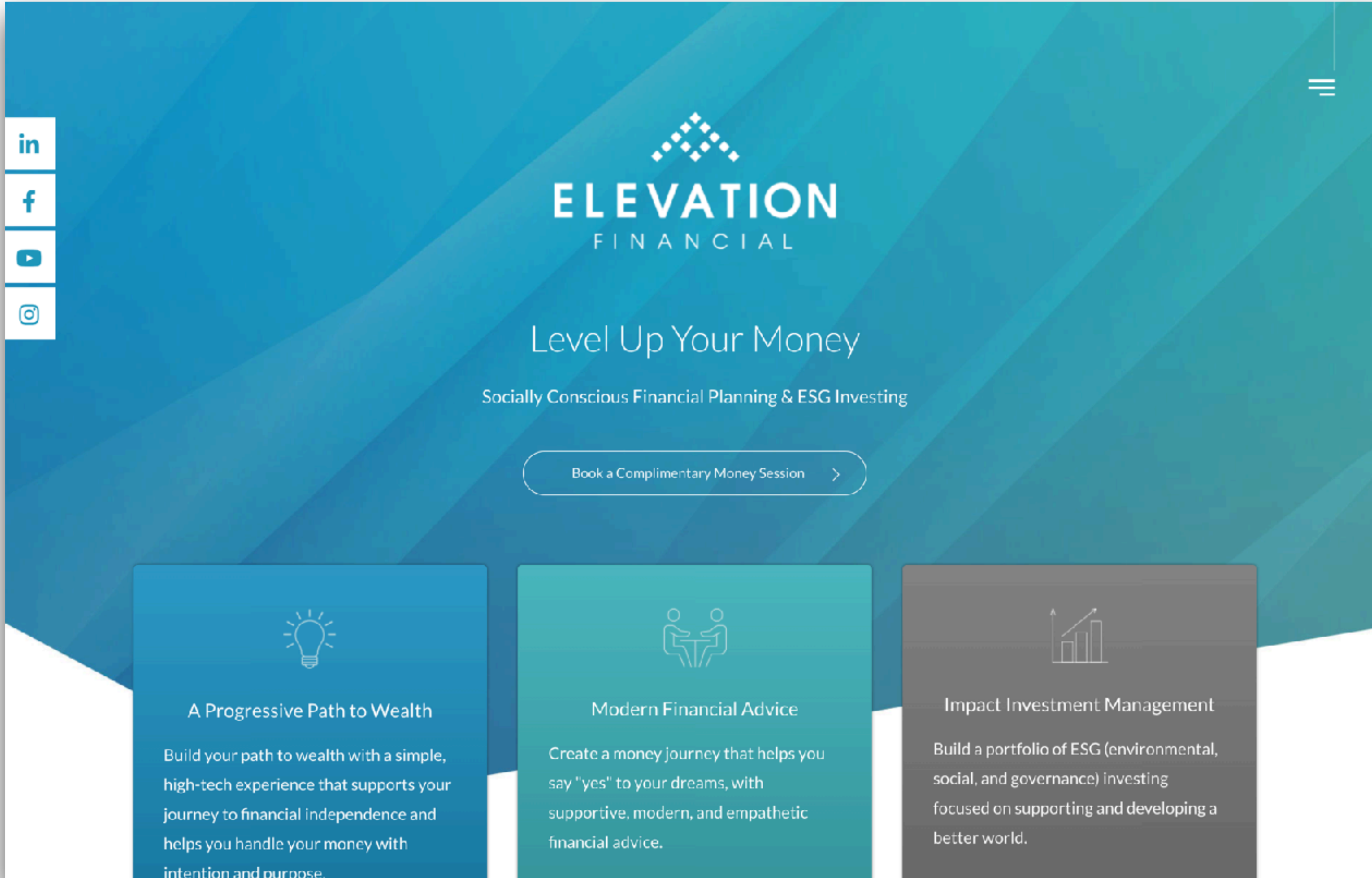
[About](#)[Services & Fees](#)[FAQ](#)[Client Portal](#)[CONNECT](#)

# Follow Your Muse.

Financial planning, investment management, and college/student loan planning for professional musicians and their families.

[EXPLORE](#)





[MEET CODY](#)[SERVICE & FEES](#)[PLANNING PROCESS](#)[CONTACT](#)[RESOURCES](#)[LET'S MAKE A PLAN](#)

## Advice-Only Financial Planning for DIY Investors

Would you like to translate complex financial decisions into a simplified narrative and measurable action plan?

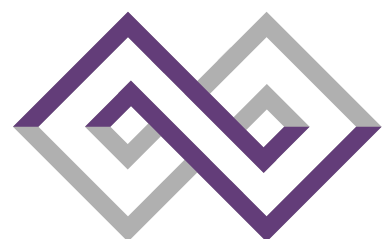
A financial planning relationship can provide clarity and confidence to make well-informed decisions on the path to financial independence. Measure Twice Financial offers fee-only, comprehensive financial education and advice without managing your money. No product sales, no hidden fees, and no control over your investments.

[Learn More](#)[Schedule My Introduction Call](#)



# Simplicity

- 5-7 pages for most RIA websites.
- Less is more.

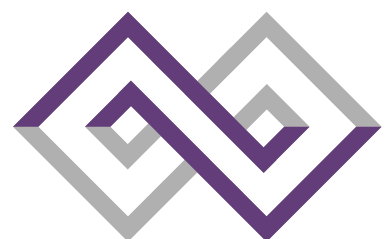




[About](#)[Services & Fees ▾](#)[Client Tools](#)[Contact](#)[CONNECT](#)

# A FINANCIAL PARTNER

Objective Wealth walks along side you as a partner to help you navigate life's financial twists and turns. We help you manage both current financial concerns as well as plan for what comes next.

[MORE INFORMATION](#)





# Be Splendid While Blended

Financial Advisor to Remarried Baby Boomers with Blended Families

EXPLORE



MEET ANNE MARIE

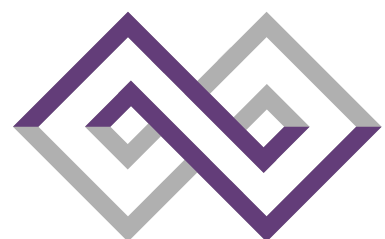
SERVICES AND FEES

FAQ

CLIENT PORTAL

CONTACT US

in







## Evaluation Aides

- Strong “About” page (with personality).
- Frequent Asked Questions (FAQ).
- Credentials.







# About Elevation Financial

## An independent, fee-only, fiduciary RIA

*Elevation Financial is led and owned by me, Michael Reynolds, CSRIC®.*

I'm an independent financial advisor and owner of Elevation Financial.

I'm a parallel entrepreneur and former digital marketing agency owner. After owning a digital agency for 23 years, I founded and co-founded four new businesses (including Elevation Financial) from 2015 to 2019. I sold my agency in 2018 to focus on my new ventures and grow my advisory firm.

While owning an agency was fun and (mostly/sometimes/maybe) rewarding, I developed a strong desire to **help people win with money.**

I believe that it's fundamentally important to learn to take control of your money because money touches *every part of our lives* and is the foundation that supports and empowers our life decisions both large and small.

I also believe that financial education and coaching should be **accessible to everyone** which is why I've designed my firm with no minimums, allowing you to work with me no matter what phase of your financial journey you are in and from anywhere in the U.S.

I host a weekly personal finance podcast called [Wealth Redefined®](#) which can be found whenever you listen to podcasts.

I'm a sushi lover, Star Trek nerd and firmly in defense of one space after a period.

Read more about our [philosophy and investment thesis as a firm.](#)





### Do I have to be in your area or can you work with me remotely?

You're in luck! I primarily work remotely. I work with clients anywhere in the U.S. through video conferencing and other internet-based systems. This allows us to be as efficient and environmentally-friendly as possible and avoid unnecessary travel time.

### Is there a minimum amount of money I have to have to work with you?

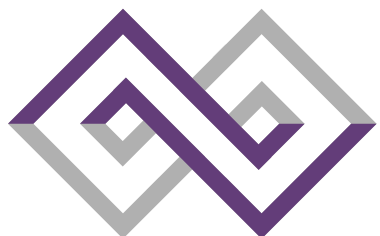
Nope! We will start with where you are.

### Are you a fiduciary fee-only advisor?

Yes! And if you're not sure what that means, you can [read about fee-only advising here](#).

### Where is my money held if I work with you?

We work with Altruist & Schwab, both modern tech-forward custodians. You will have full online access and a mobile app to access your accounts. Your money will be held with these custodians at all times.





# Pricing

- Lowers prospective client anxiety.
- Bypasses the pricing conversation.
- Increases efficiency.
- Demonstrates transparency.







LEARN MORE

About  
LEARN MORE

Services & Fees ▾

Client Tools

Contact  
LEARN MORE

CONNECT

## FEES

### Comprehensive Financial Planning

**Starts at: \$3,600 / Year**

\*The total fee is based on complexity

*Fee is waived if we manage \$500,000 or more*

### Investment Management

**\$0 - \$1,000,000 --- 0.90% Annually**

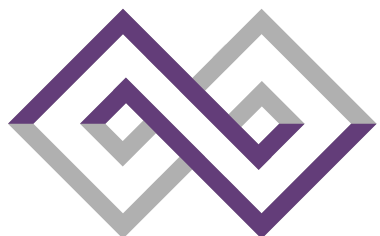
**\$1,000,001 - \$5,000,000 --- 0.50% Annually**

**\$5,000,001 AND ABOVE --- 0.30% Annually**

*Fee is billed quarterly from investment accounts*

### Tax Preparation

Pricing starts at \$350 (cost based on required forms and complexity)







## High-quality Photography

- Professional photos are ideal.
- Be discerning about stock photos.
- Be bold and unique.







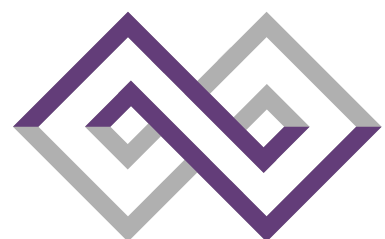
Financial  
Planning



Investment  
Management



College &  
Student  
Loan  
Planning

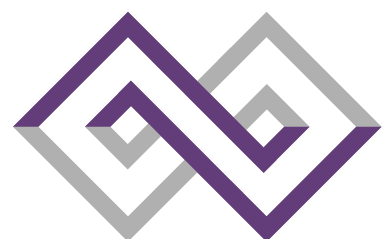




# Be Splendid While Blended

Financial Advisor to Remarried Baby Boomers with Blended Families

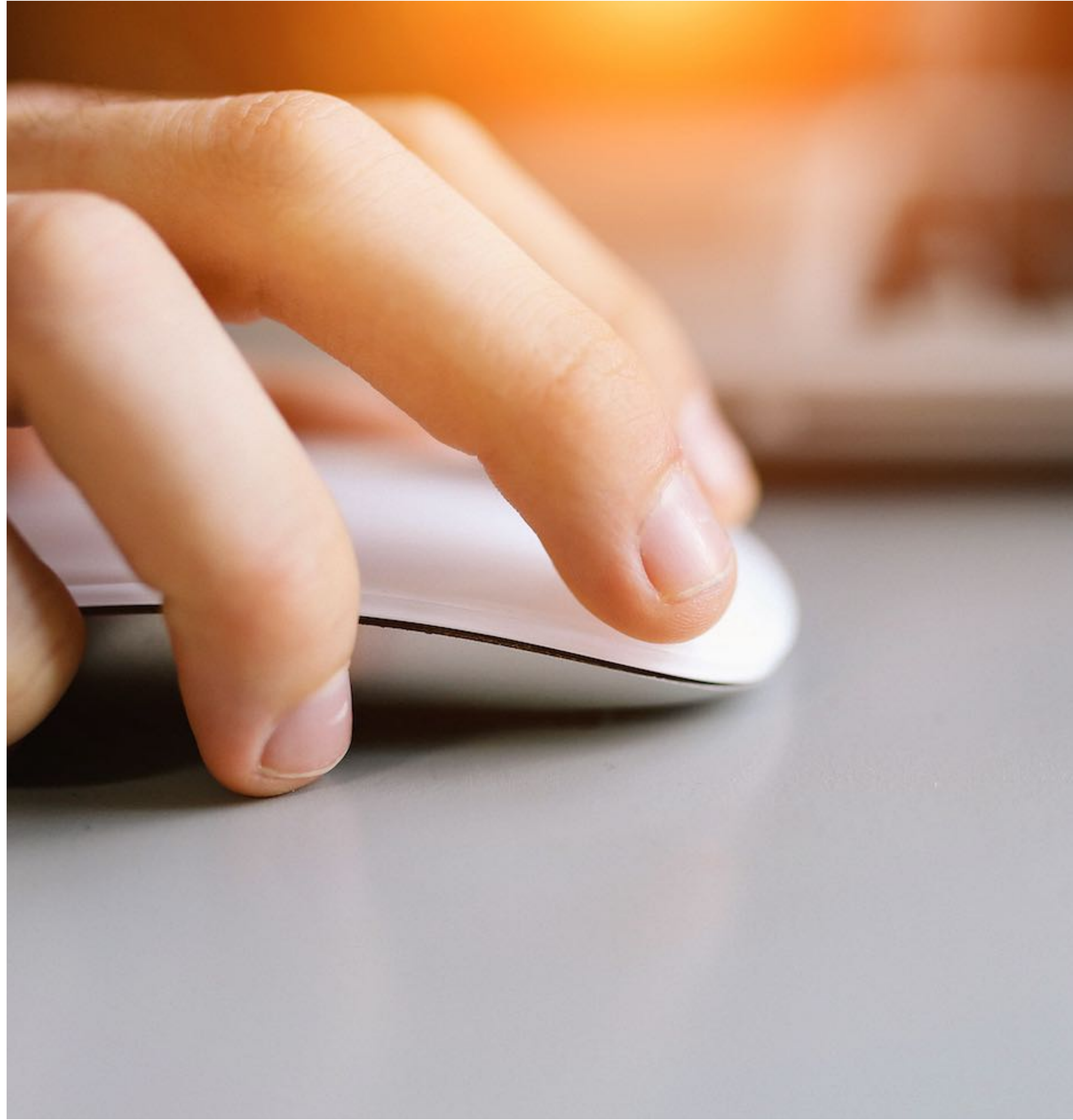
EXPLORE





## Clear Calls to Action

- Lowers prospective client anxiety.



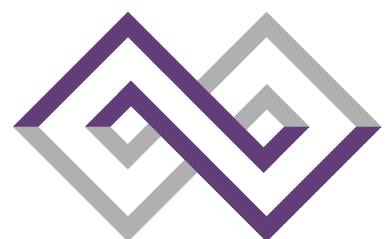




# Level Up Your Money

Socially Conscious Financial Planning & ESG Investing

Book a Complimentary Money Session







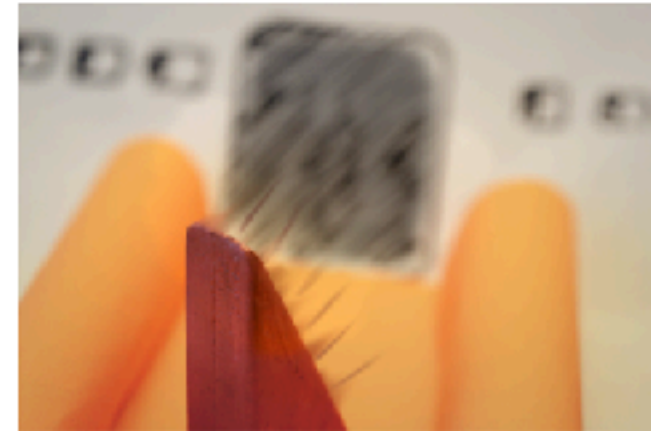
## Insights

- Content is for SEO, Insights are for people.
- Choose mediums you enjoy.
- Discuss unique topics and perspectives.
- Be consistent (unless you have a “Flagship Offer”).





## THE LATEST BLOG POSTS



### THINKING ABOUT LEAVING YOUR JOB? THINK THROUGH THESE THINGS FIRST.

February 15, 2022 | [Financial planning](#)

As The Great Resignation continues to unfold, have you been tempted to put in your own two weeks' notice? Perhaps you've even fantasized about your own version of the moment

[READ MORE](#)

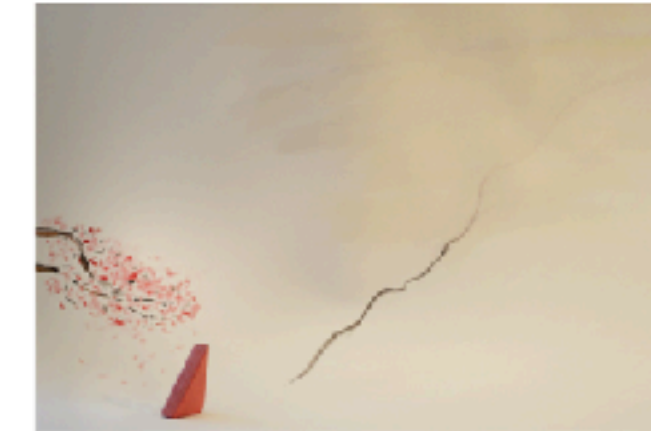


### DREAMING OF A MID-CAREER BREAK? HERE'S HOW ONE WOMAN IN TECH TOOK THE LEAP, DESPITE HER FEARS.

February 8, 2022 | [Financial planning](#)

When I was 23, I threw caution to the wind by quitting my first "real" job, at a sales company. Rather than doing something conventional like getting a new position

[READ MORE](#)



### MONEY AND TIME BOTH FEEL SCARCE. HOW CAN YOU FEEL MORE ABUNDANT?

January 27, 2022 | [Financial planning](#)

One of the primary concerns of the women we work with is a sense of overwhelming busyness. If they were granted three wishes, finding a sense of "time spaciousness" would

[READ MORE](#)



### WHAT I—AND HOPEFULLY YOU—CAN LEARN FROM MY 85-YEAR-OLD AUNT.

January 6, 2022 | [Financial planning](#)



### YOU CAN SAVE IN THREE DIFFERENT TAX "BUCKETS." WHAT ARE THEY, AND WHY SHOULD YOU CARE?

December 21, 2021 | [Investing](#)



### PROTECT YOUR TAX RETURN FROM THE BAD GUYS (NO, NOT THE IRS)

December 20, 2021 | [Financial planning](#)

A client recently told me a harrowing story of



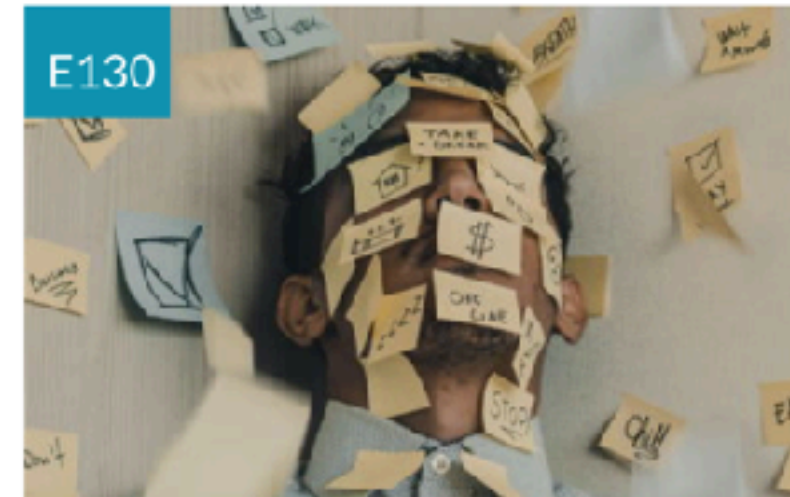




E131

**E131: Should I Buy the Dip?**

[Jan 19, 2022](#)



E130

**E130: Budget Alternatives for  
People Who Don't Want to Budget**

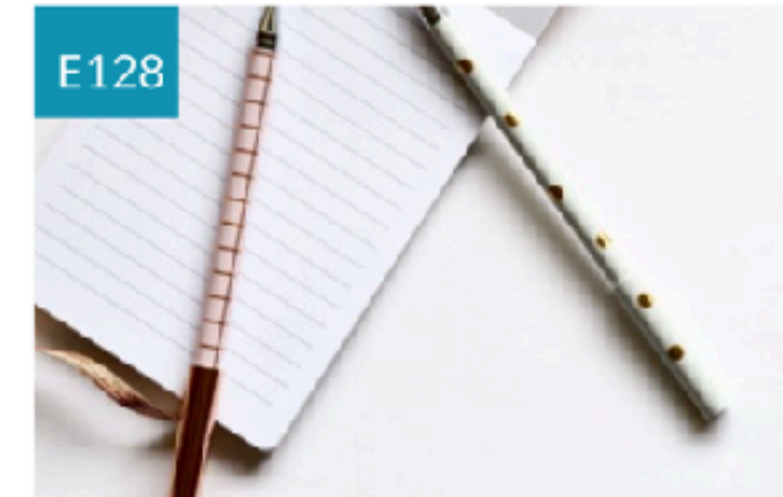
[Jan 12, 2022](#)



E129

**E129: My Three Words for 2022**

[Jan 5, 2022](#)



E128

**E128: What It's Like to Work With  
Me**

[Dec 15, 2021](#)



E127

**E127: Getting in Shape to Be a  
Solid Home Buyer**

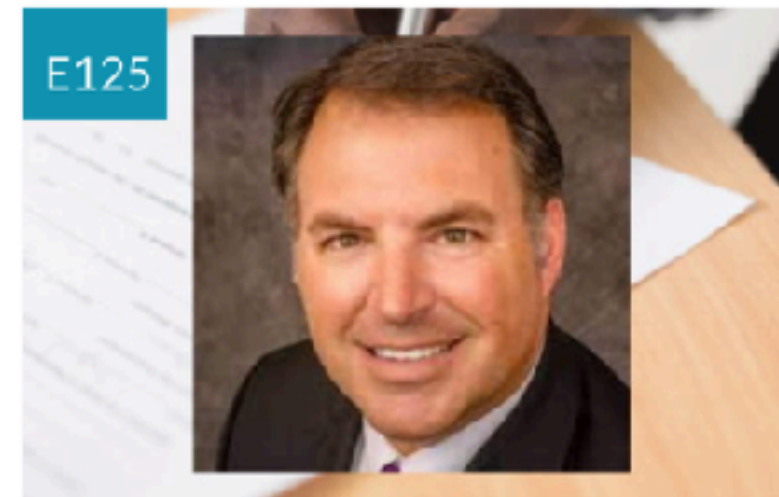
[Dec 8, 2021](#)



E126

**E126: What I Look for When  
Evaluating Mutual Funds and ETFs**

[Dec 1, 2021](#)



E125

**E125: The Basic Estate Planning  
Documents that Everyone Needs**

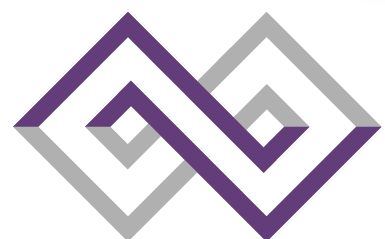
[Nov 24, 2021](#)



E124

**E124: Unpacking the HSA and How  
It Works**

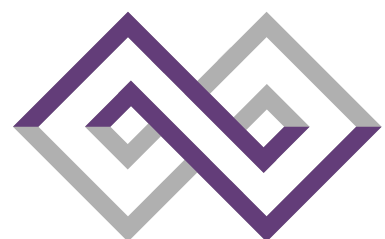
[Nov 17, 2021](#)





# Accessibility

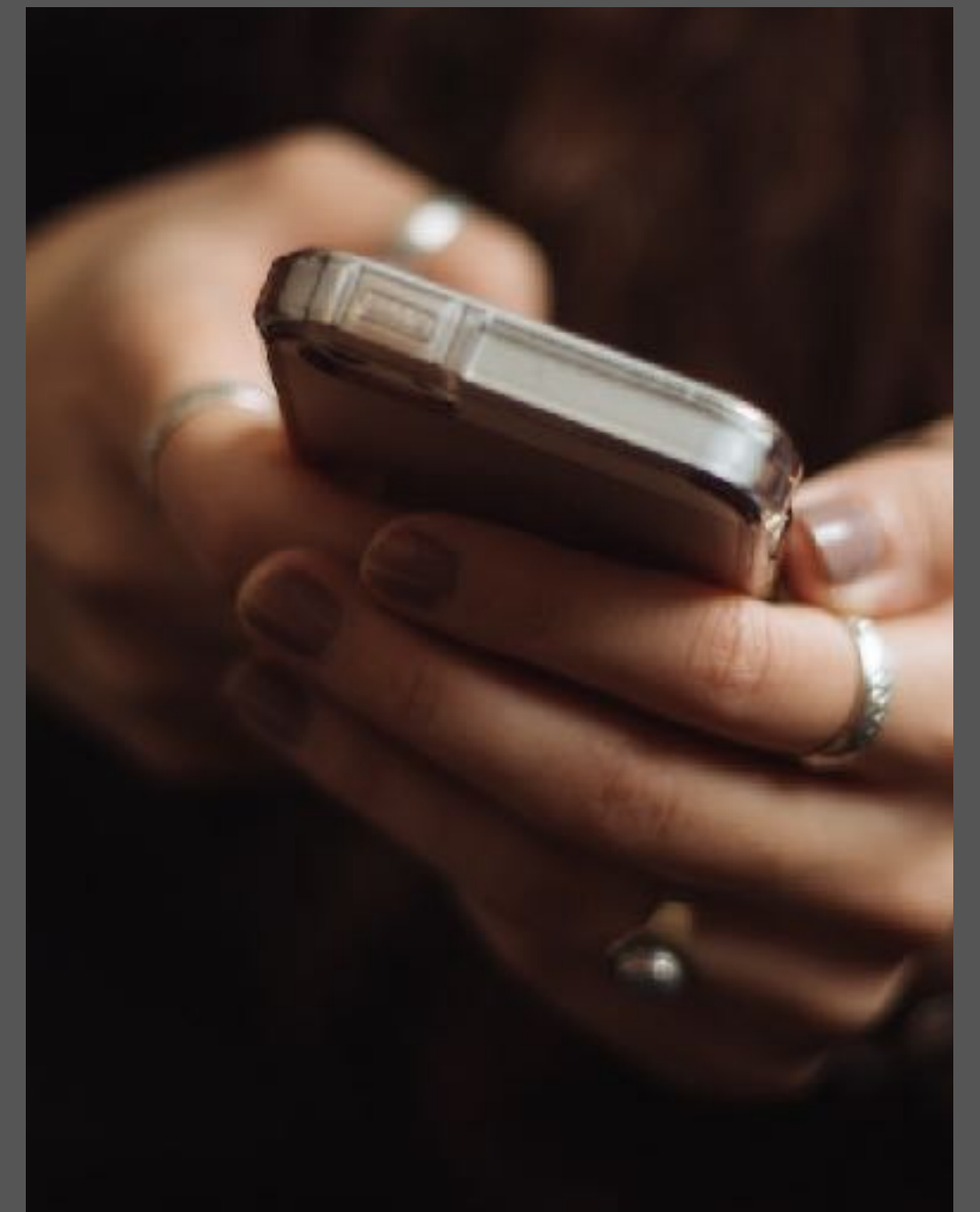
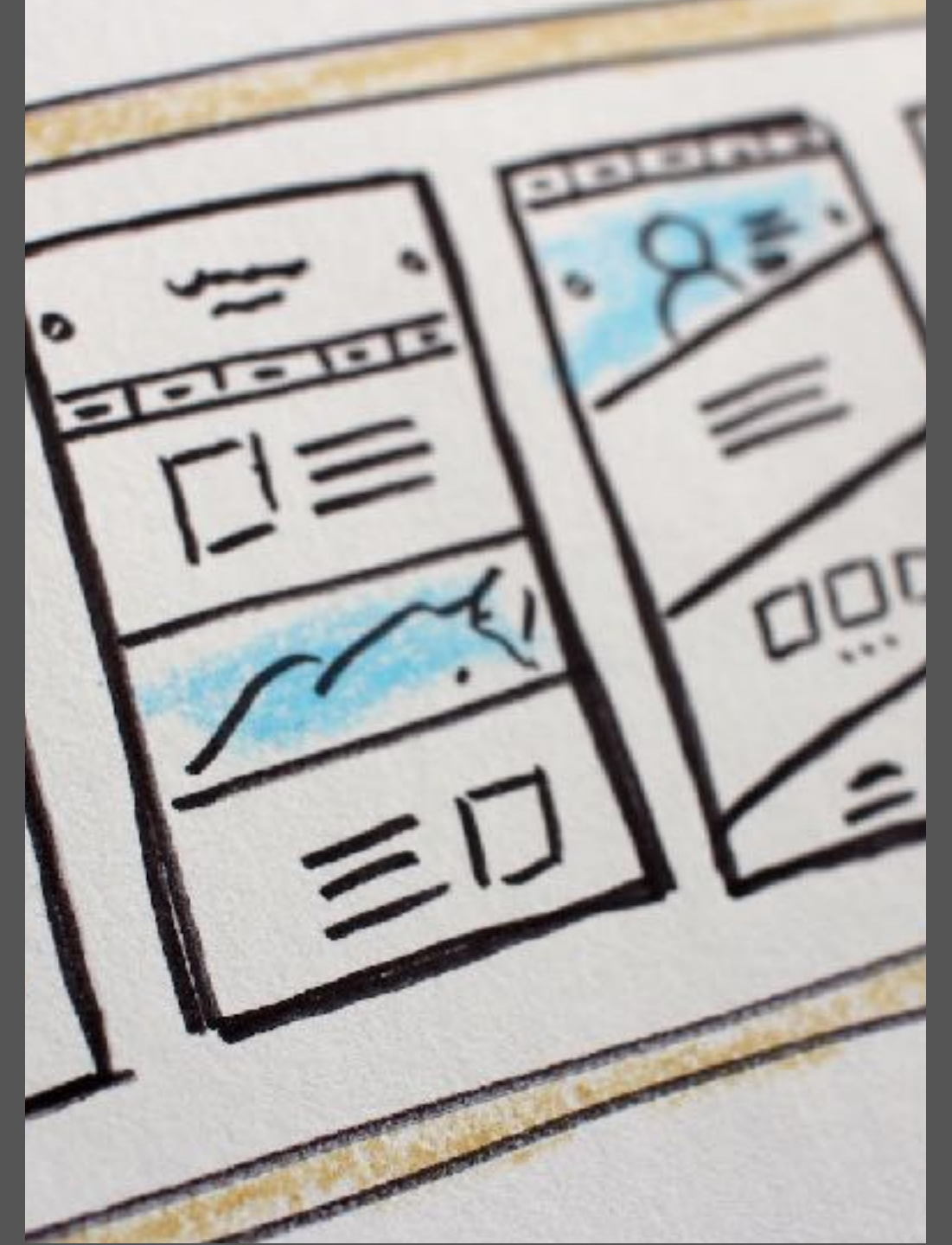
- Ensure accessibility for people of all abilities.
- Good for both people **and** Google.





# Guidelines

- ALT text for screen readers.
- Captions for audio impaired users.
- High-contrast content for readability.
- Simple formatting for easy consumption.
- Clear, simple fonts.
- Simple menu structure.
- “Plain-spoken” content for cognitive ease.
- Multiple methods of contact.

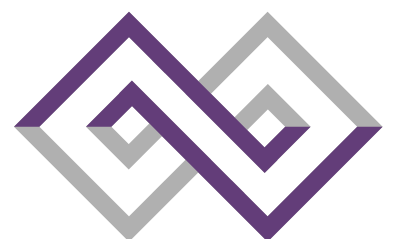






## Security

- Secure, well-maintained platform if cloud.
- Properly maintained if open source.
- 2FA for login.
- SSL by default for entire website (also an SEO ranking factor).





# Speed

- Slow websites frustrate users.
- Google loves page speed.







## Latest Performance Report for:

<https://www.elevationfinancial.com/>

Report generated: Thu, Feb 17, 2022 9:30 AM -0800

Test Server Location: Vancouver, Canada

Using: Chrome (Desktop) 90.0.4430.212, Lighthouse 8.3.0

### GTmetrix Grade ?

A	Performance ?	Structure ?
	99%	92%

### Web Vitals ?

Largest Contentful Paint ?	Total Blocking Time ?	Cumulative Layout Shift ?
801ms	0ms	0.05

#### Summary

#### Performance

#### Structure

#### Waterfall

#### Video

#### History

### Speed Visualization ?

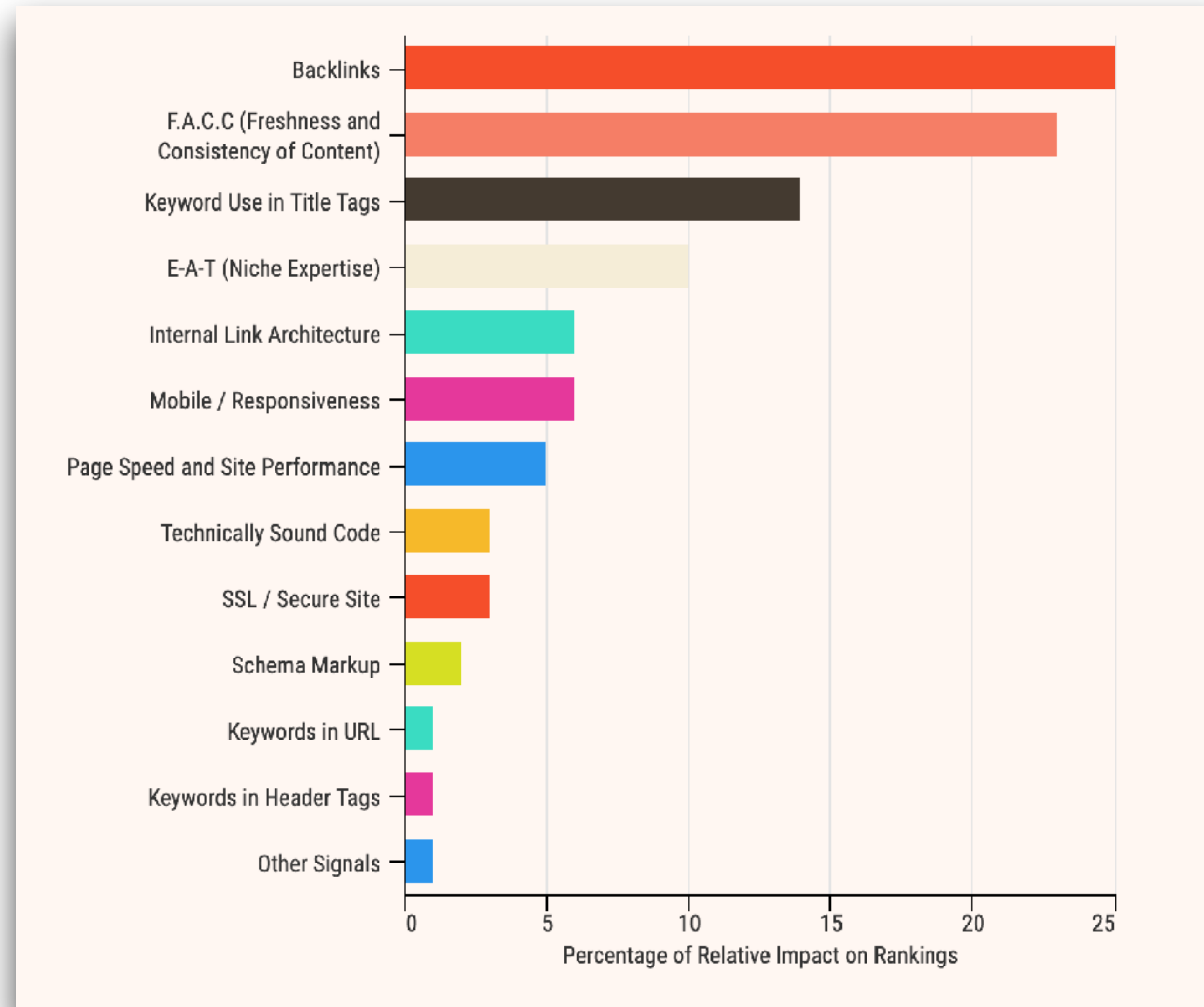




## BONUS: SEO Elements







Source: 2021 SEO study by Jamie McKaye across 344 websites.





# HAVE QUESTIONS?

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Contact Michael Reynolds - [michael.reynolds@zephyrcms.com](mailto:michael.reynolds@zephyrcms.com)

