



SEO for Financial Services

December 6th., 2024

Agenda



Presentation duration

30 Minutes



Conductor Speakers:

- Nate Endres, Senior SEO Analyst at Conductor

1. Financial Services + SEO - Why Does it Matter?
2. Financial Service Search Landscape
3. Local SEO
4. Foundational SEO
5. Content & Keywords (E-E-A-T)
6. Technical SEO

The background features a complex, abstract design with overlapping organic shapes in various shades of teal and a light beige or cream color. Some areas have a fine, stippled texture. A prominent white rectangular box is centered horizontally, containing the main text.

Financial Services + SEO - Why Does it Matter?

Why is SEO Important in the Financial Services Sector?

85% of Americans prefer to bank online, 55% via a mobile app specifically. Your digital presence is extremely important to potential clients. (Source: GOBankingRates)

Helps your business reach new clients that may be unfamiliar with your services

While not “free” in terms of investment, strong organic visibility can drive traffic without needing to pay-per-click

Helps diversify your traffic streams so you aren't reliant on one or two channels

Financial Services Search Landscape

The Financial Services Search Landscape is Among the Most Difficult to Navigate

- Competitions is high, with search results shared by both local and national entities - competitors offering your services and publishers writing about them (Forbes, nerdWallet, etc.)
- Search results for financial services queries feature a variety search result types - local pack, people also ask, quick answers, etc.
- Financial services is a YMYL (Your Money, Your Life) industry, with Google's algorithm applying a high level of scrutiny to web sites trying to rank within the space
- High regulatory standards make creating & optimizing content more difficult

SEO Trends for Financial Services

Localization/Personalization

Increased personalization/localization make search results very different for the same keyword depending on location & individual search history

Interactive/Enhanced SERPs

Google's enhanced SERP features, like knowledge panels and direct conversion tools fulfill user intent by providing immediate concise answers without having to click on a result.

Result Diversification

Google and other search engines are making an effort to diversify results This means your site is competing for space with not only its direct business competitors, but also a variety of sites that cover topics in the financial services industry

Anatomy of Financial Services Search Results

Paid Listings

Sponsored

 Creative Planning
<https://www.creativeplanning.com/financial-advisors>

Minneapolis Financial Advisors

Trusted Fiduciary — 40+ Years — We're a fiduciary. We'll act in your best interests to help you reach your **financial** goals. RIA.

Financial planner · Minneapolis · Open · Closes 5PM



People Also Ask

People also ask :

Is it worth paying for a financial advisor? ▼

How much money should you have to see a financial advisor? ▼

Are financial advisers worth cost? ▼

What is the difference between a financial planner and advisor? ▼

Feedback

Local Results

Businesses :

Hours ▾

Sort by ▾

Edward Jones - Financial Advisor: Patrick...

4.7 ★★★★★ (3) · Financial consultant

7+ years in business · 4808 Nicollet Ave · (612) 345-...

Open · Closes 4:30 PM



Website



Directions

Box Financial Advisors Inc

5.0 ★★★★★ (2) · Financial planner

10+ years in business · 901 S Marquette Ave Suite 2...

Open · Closes 5 PM



Website



Directions

Schwarz | Dygos | Wheeler Investment A...

No reviews · Financial planner

10+ years in business · 50 South 6th St #1405 · (612)...

Open · Closes 4:30 PM

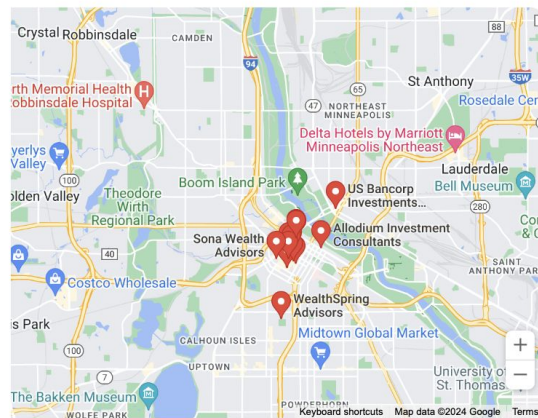


Website



Directions

More businesses →



Quick Answer

Different types of mutual funds

From sources across the web

Bond funds ▼

Money market funds ▼

Stock market index ▼

Equity funds ▼

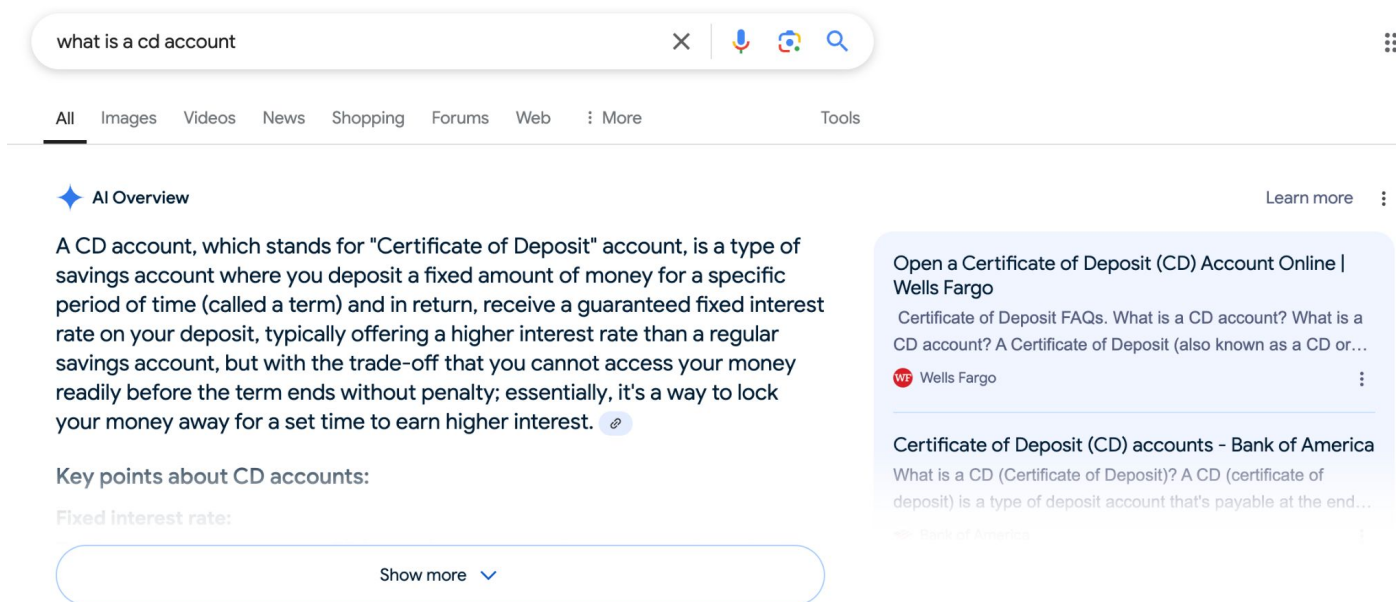
Target date funds ▼

Income ▼

12 more ▼

AI is Attempting to Answer User's Questions & Prolong Interaction within Google search results

- In May 2024, Google rolled out expanded AI overviews to US users
- AI overviews display similar to Quick Answers. Google compiles an answer from a number of sources then links to those sources in the 'Learn more' section
- Google claims these 'Learn more' links generate more clicks than a traditional search result
- Google's rollout has been far from perfect, with AI generating misleading and nonsensical answers for some queries. Google scaled back its rollout as a response at the end of May



The screenshot shows a Google search for "what is a cd account". The search bar is at the top with the query "what is a cd account" and navigation icons for voice search, image search, and search. Below the search bar are filters for "All", "Images", "Videos", "News", "Shopping", "Forums", "Web", and "More".

The main content area features an "AI Overview" section, indicated by a blue star icon. The text reads: "A CD account, which stands for 'Certificate of Deposit' account, is a type of savings account where you deposit a fixed amount of money for a specific period of time (called a term) and in return, receive a guaranteed fixed interest rate on your deposit, typically offering a higher interest rate than a regular savings account, but with the trade-off that you cannot access your money readily before the term ends without penalty; essentially, it's a way to lock your money away for a set time to earn higher interest." A small "e" icon is visible at the end of the paragraph.

Below the AI overview is a section titled "Key points about CD accounts:" followed by a sub-section "Fixed interest rate:". A "Show more" button with a downward arrow is located at the bottom of this section.

On the right side of the search results, there are two search results from Wells Fargo and Bank of America. The Wells Fargo result is titled "Open a Certificate of Deposit (CD) Account Online | Wells Fargo" and includes a snippet: "Certificate of Deposit FAQs. What is a CD account? What is a CD account? A Certificate of Deposit (also known as a CD or...". The Bank of America result is titled "Certificate of Deposit (CD) accounts - Bank of America" and includes a snippet: "What is a CD (Certificate of Deposit)? A CD (certificate of deposit) is a type of deposit account that's payable at the end...".

Local Search

Defining Some of the Local Ranking Factors

Link Signals

Provide Google with context on how important your site is for its users, by way of reviewing links from both your site and other sites to yours.

On-Page Signals

Inclusive of title tags, meta descriptions, ALT tags, keywords within heading tags and on-page content

Behavioral Signals

Clicks that your site is getting vs. others in the space. Also known as the “popularity” of your site.

Personalization

The concept of maximizing your website, content and business for a target audience.

Citation Signals

Mentions of your business name, address and phone number that’s not part of your company. Also referred to as NAP.

Reviews & Social Signals

Reviews and social signals are checked for relevance by Google to determine quality and popularity.

Tips for Optimizing Your Google Business Profile Listings

Ensure All Fields Are Filled In

Make sure your profile communicates what your business does, where it is and how they can contact you.

Include Target Keywords

Like everything else with SEO, keywords are important. Include them where possible in your profile.

Keep Hours Up to Date

Include your business hours and update them as they change. Ensure you have a process in place if you have several locations for keeping these updated.

Add Photos

Businesses with photos on their profiles receive 42% more requests for driving directions and 35% more click-throughs to websites than ones without*

Manage & Respond to Reviews

Interacting with customers helps perception of your business and also increases your business' visibility in results.

Leverage Special Attributes & Product Catalogs

Research what's available for your business inside of GBP and use it!

Final Tips for Local Search

Do Localized Keyword Research & Track by Location

Conductor allows you to understand local MSV and report out on local performance through our platform - leverage these tools!

Consider Testing Localized Content

In some cases, creating hyperlocal content can give you an edge over competitors. Think about what local users might be interested in and test out adding it to your location pages.

Establish Governance & Process Around Listings

Ensuring consistency in your listings can be overwhelming depending on the number of locations your business has. Establishing governance over who has access to these listings can greatly diminish inconsistencies.

Foundational SEO

On-Page Optimization Provides Your SEO Foundation

Foundational SEO refers to the key page elements you must optimize to help search engines understand what your pages, and website, are about

- Title
- Meta Description
- URL Structure
- Headings (H1, H2, H3...)
- Images (Alt Text)
- Internal Links (Anchor Text)

Key SEO Elements - Best Practices Cheat Sheet

Title Tag & Meta Description

Title Tag

- Unique to each page
- 50-60 characters long
- Include primary & secondary keywords
- Ensure it reads naturally
- Branding at the end

Meta Description

- Unique to each page
- 150-160 characters
- Compelling & relevant to the page
- Entices click through

URL

- Keep it simple and straightforward
- Include your keyword as close to the root of your URL as possible
- Avoid parameter strings, capital letters, underscores or spaces (use dashes)
- Avoid using stop words (of, a, and, the, etc.)
- Shorter than 2,083 characters

Heading Tags

- Map H1 to the title tag
- Should include most important keywords and serve as the title of the book
- Only one H1 should be used per page
- H2-H6 can be used as the chapters of the book, can have multiple H2s, H3s etc. Include secondary and tertiary keywords

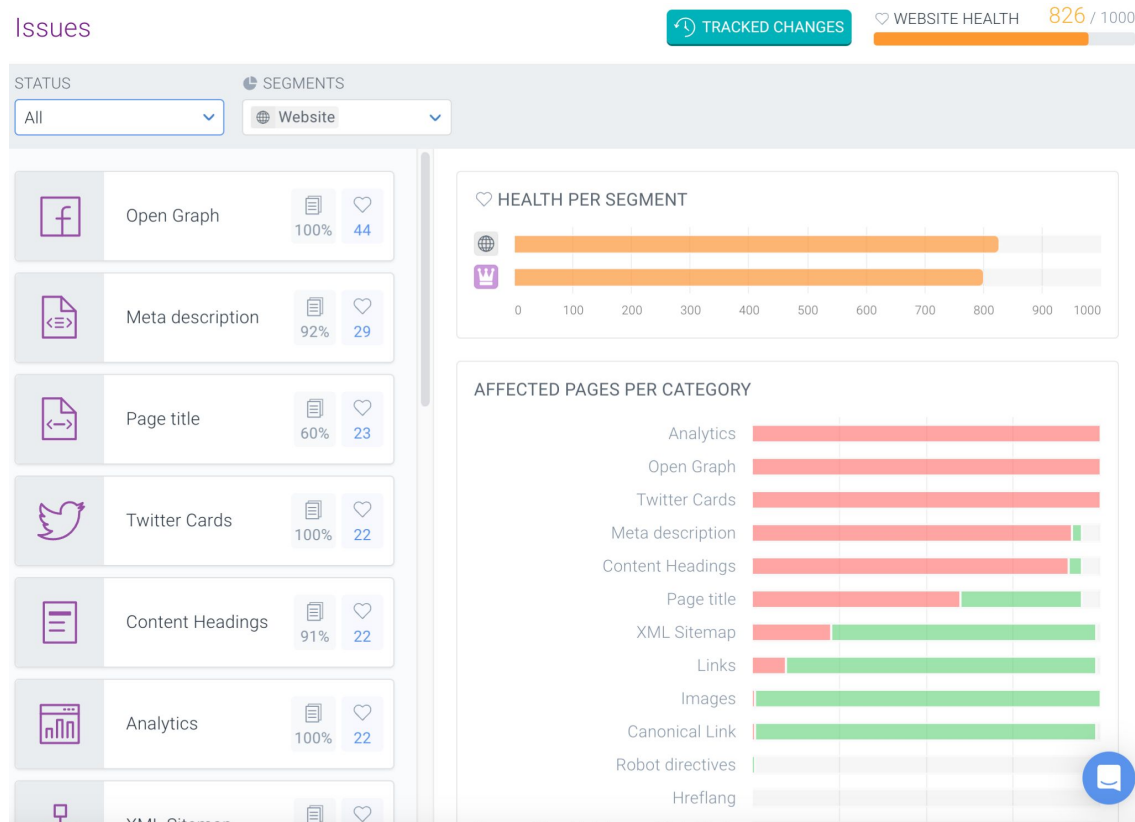
Images

- Include keywords in the ALT text of the image
- Ensure that the alt text accurately describes the content of the image
- Make image alt text short and descriptive
- Important for ADA compliance

Internal Links

- Links are how your content gets found!
- Use anchor text
- Link deeply when possibly throughout the site
- Use links that feel natural to the reader
- Use relevant and 'follow' links
- Use between 3-4 links per 1,000 words of content

How Conductor Can Help: ContentKing Issues Report



- ContentKing crawls your website in much the same way a search engine would and will monitor and flag foundational SEO content issues
- Foundational SEO issues ContentKing can help you uncover and address include:
 - Titles that are missing, duplicative, or too long to display fully in search engines
 - Meta descriptions that are missing, duplicative, too long to display fully in search engines
 - Missing, multiple, or duplicative H1 tags
 - Images missing alt tags

Content & Keywords

Expertise and Accuracy are Especially Important in the Financial Services Landscape

Google applies a special degree of scrutiny to queries pertaining to YMYL (Your Money, Your Life) topics, including financial services

Creating authoritative, competitive financial content requires an understanding of E-E-A-T (Experience, Expertise, Authority, and Trustworthiness)

What is E-E-A-T?

Experience

Experience means the extent to which the content creator has the necessary first-hand or life experience for the topic.

Expertise

Consider the extent to which the content creator has the necessary knowledge or skill for the topic. Different topics require different levels and types of expertise to be trustworthy.

Authoritativeness

Consider the extent to which the content creator or the website it known as a go-to source for the topic. While most topics do not have one official, Authoritative website or content creator, when they do, the website or content creator is often among the most reliable and trustworthy sources.

Trustworthiness

Trust is the mechanism by which raters determine if the page is “accurate, honest, safe, and reliable.

Raters look for things like:

- Sufficient contact information, content accuracy and citing of sources and security of the site.

How to assess your content for E-E-A-T



Foundational elements

- The content is **in-depth, specific, and helpful** to the human reading it.
- The content is not overly promotional.



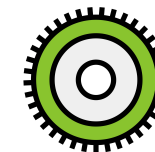
Who created the content?

Is it **self-evident** to your visitors who authored your content?



How was the content created?

Sharing **details about the processes** involved can help readers and visitors better understand how your unique piece of content was created.



Why was the content created?

The "why" is that you're **creating content primarily to help people**, content that is useful to visitors. If you're doing this, you're aligning with E-E-A-T.

Leverage In-House Expertise to Strengthen E-E-A-T

Reviews & Mentions

- Get good reviews on external sites.
- Get mentioned on authoritative sites.

Content

- Align with your audience, answer the questions they are **already asking**.
- Provide **in-depth content** with diverse ways to consume the content (i.e., written, video, graphics).

Authorship

- Implement **Author boxes & bylines**.
- Develop **author pages** to be linked to from author boxes & bylines.
- Link to external profiles, such as LinkedIn profile pages.

Structured Data

- Demonstrate E-E-A-T throughout schema types on your site.
 - E.g., [Organization schema](#), with properties such as SameAs schema linking to social media profiles.
 - Use comprehensive [Article schema](#) with author information on applicable pages.
- Implement [ProfilePage schema](#) on author pages.

A well-optimized Financial Services site has content that aligns to each stage of the customer journey

High Funnel

Informational Content

This is content that familiarizes potential customers/patient with your brand and helps customers learn about your services

Medium Funnel

Consideration Content

This is content that allows your potential customers/patients to browse your service offerings and learn more about them.

Low Funnel

Transactional Content

This is content that allows your customers/patients to take action - schedule an appointment, request more information,, contact you, etc.

Keywords help us identify what content customers need and how they're searching for it



Search Volume (MSV)

How many searches took place for a particular query in a given month. The higher the volume, the higher the searches and competition.



Relevance

While search volume is a great measurement for competition and strength, it's not always the best way to determine relevance.

Well-optimized content should rank for a variety of related keyword variations

Primary Keyword

The central keyword you would like this particular page to rank for, typically with search volume and page relevancy.

Should appear at the front of your title tag, and also in your meta description, H1 & body content.

Secondary Keyword

Complementary to the primary (and may even include another modifier).

Should appear in your title tag if possible, an H2, and within your body content.

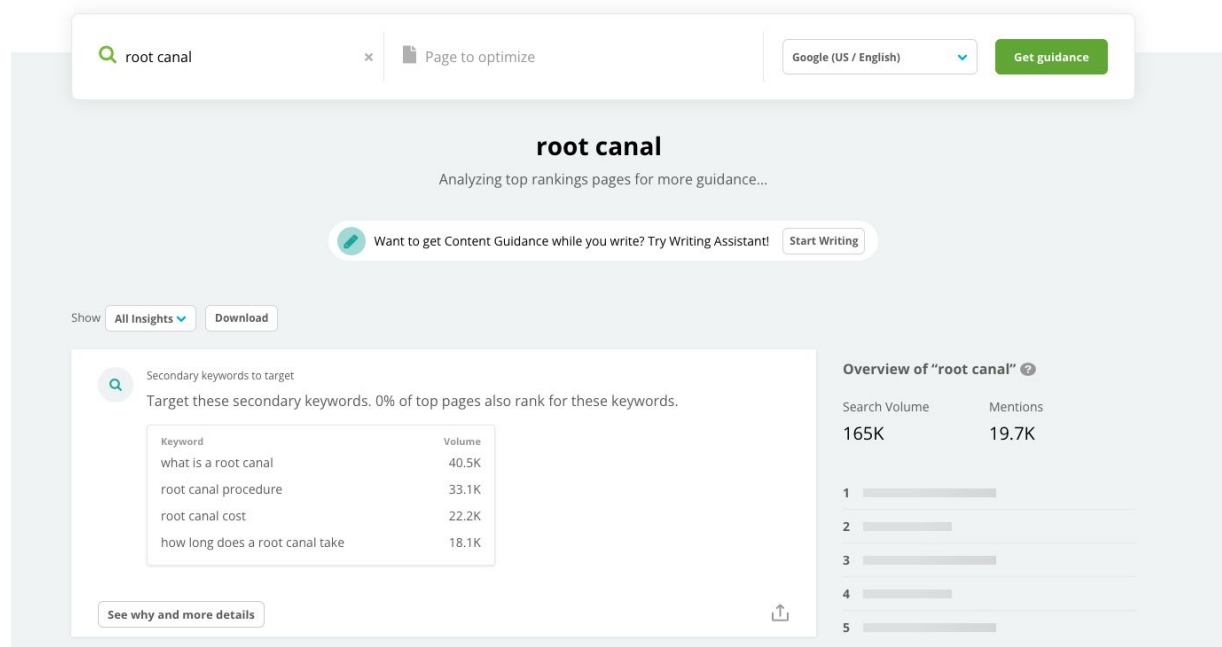
Tertiary Keyword

Not always necessary (or available), highly long-tail targeting specific, lower-volume niche keywords.

Can appear in your title tag if length allows, and should appear in body content where applicable.

Remember: You Don't Have To Target Every Keyword To Rank For Them!
Latent Semantic Indexing identifies patterns, as well as related terms and concepts.
For example: Lug nut wrench, automobile, fix and wheel are all semantically related to "flat tire."
Using these terms within the content will help better contextualize its meaning.

How Conductor Can Help: Content Guidance



- Content Guidance can help you understand how potential customers are searching for your products and how to create content that reaches them
- Entering a keyword/topic can help you uncover:
 - The highest volume keywords associated with your topic
 - Important related secondary and tertiary keywords
 - Search competitor pages ranking highest for the topic
 - Commonalities between high ranking pages inform content creation
 - Questions answered
 - Structure
 - Length
 - Meta data (title, headings, etc)

Technical SEO

Technical SEO helps ensure users, and search engines, have a positive experience on your site

Crawling & Indexation

Can search engines find and index your site and its constituent pages?

Site Architecture

Can users, & search engines, move easily and logically through your site's content?

Sitespeed & Usability

Is your site fast and easy to shop on/interact with regardless of device?

What Technical Components Will Matter for E-E-A-T?

Strong Link Signals

Fix up any broken links and redirects across your site

Evaluate your backlink profile - how do you stack up vs. competitors in the space?

Page Speed

Review your Core Web Vitals and tackle any low-hanging fruit

Solid Information Architecture

Ensure that your content is easy to find, utilizing things like your navigation and breadcrumbs to guide users and search engines

High Quality Content

This could mean redirecting old, underperforming content or refreshing evergreen content that just needs a facelift.

Review engagement metrics on your content to assess whether it's worth keeping or removing.

Basic Ways You Can Monitor & Improve Your Technical SEO

Keep XML Sitemap Updated

An XML Sitemap contains the pages & images you want crawled & indexed on your site and helps search engines find them. Keep it up to date and free of errors

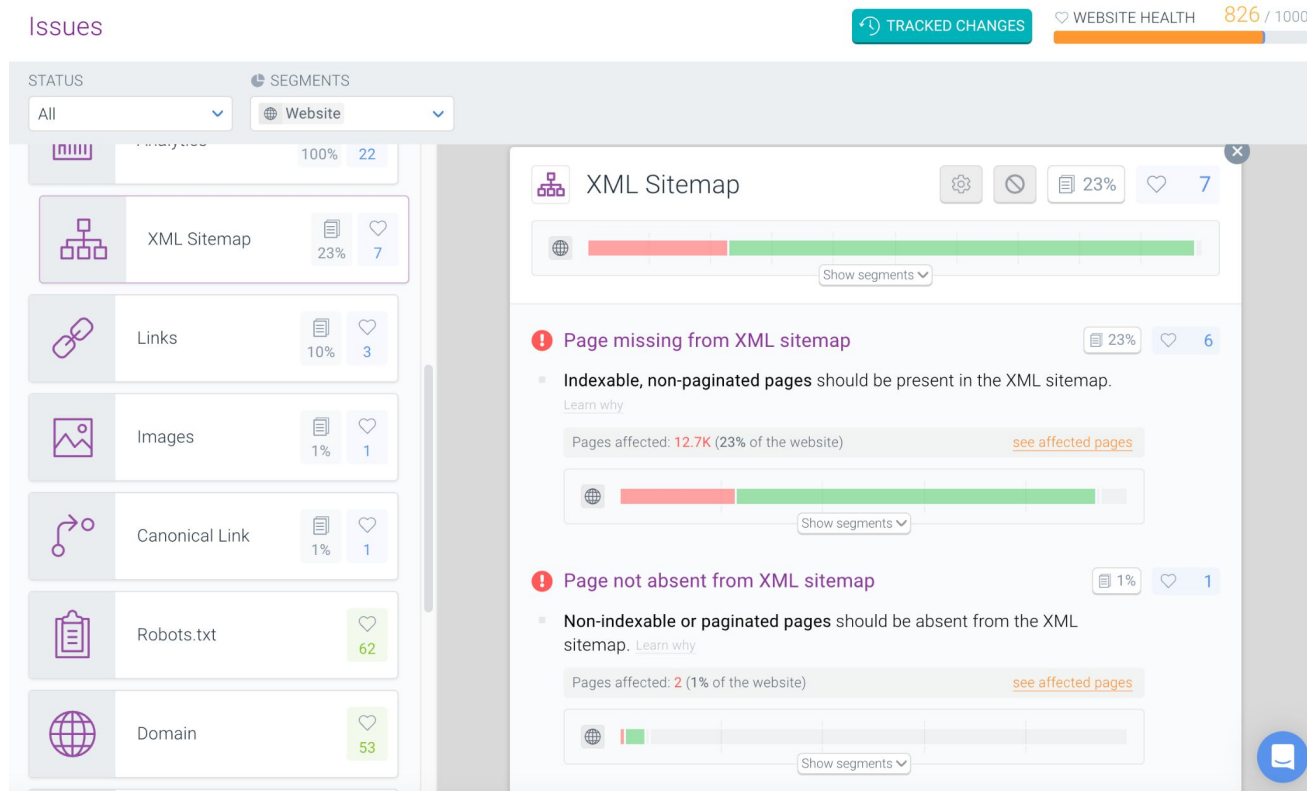
Set Up & Monitor Google Search Console

Google Search Console can not only help you understand what keywords are driving traffic to your site, its varied reports can alert you to issues with your site's indexation, sitespeed, and usability

Add Structured Markup

Structured data is standardized code that helps search engines understand your page content and display it in search results.

How Conductor Can Help: ContentKing Issues Report



- ContentKing can also help you monitor key aspects of your site's technical health and surface issues when they arise
- Monitor key issues impacting your site's indexation and technical health like
 - XML sitemap errors
 - Robots.txt files directives that could impact indexation
 - Missing canonical tags
 - Structured Markup (Schema) errors
 - Analytics errors that could impact reporting

Summary

Key Takeaways

1. A strong local search presence is essential in the financial services space - ensure local listing are accurate and complete
2. Ensuring foundational SEO elements - titles, headings, descriptions, etc. - are optimized
3. Create well-researched, authoritative content that meets the higher E-E-A-T standards of the financial services space. Build in time and a process for legal review
4. Maintain your site's technical health and usability - especially its speed and mobile experience

The background features a complex, abstract composition of overlapping shapes. Large, solid teal shapes are interspersed with grey areas that have a fine, stippled texture. White circular and organic shapes are also present, creating a layered and dynamic visual effect. The overall aesthetic is modern and graphic.

Questions?

THANK YOU!