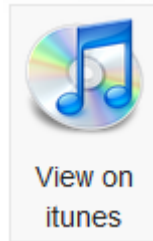
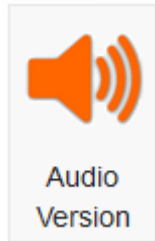




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See How Easily You Can Build Your Own High Quality Website | FEE014



Episode Transcript

Host: Scott Plaskett, CFP

So building a website as a fee-based financial planner – that is an amazing experience to go through. It can be a challenging experience because there's a lot to go into it and it's sort of like you're putting yourself out there in advance of anybody else seeing you. So the great thing about websites is that it is a great equaliser. You can make yourself look great and come across really, really professional in the image that you want to portray. Just like any of the other Fortune 500 companies or any of the other bigger firms out there. You can be a small operation working out of your home and you can still compete on the same playing field. So a website is a very powerful tool.



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Now, do you have a website? If you don't, then you're going to love this episode. Because it will reveal to you how easy it is to put together an awesome website that you can feel proud to promote. And if you do have a website then you can use the tips I'm going to reveal to either tweak or redo your existing website.

So first of all, I'm going to share with you my story when it comes to websites, just so you know where I'm coming from. I launched my first website in the late nineties. The total cost of that



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website was about \$8,000. Then I re-launched my second website, did a whole rebranding process and did everything-, just sort of took it to the next level and rebranded everything, in the early 2000s. The total cost for that was a little over \$15,000. The comments I got from my new clients and my existing clients was that they liked the layout and the fact that it highlighted my financial planning process. And that was one thing I really embraced, was the fact that I knew I needed to have a financial planning process that I could bring to the table that would allow me to differentiate myself from everybody else and all the other noise out there in the financial planning space and the financial advisory space.

So my website at the time was really a glorified business card - pretty much like 90% of the website - to see out there for the financial industry. It really was a site that, you know, made my mom proud. I was really proud to show her and say hey mom, look what I've got, I've got my first website or my second website and really did it up. And it looked great. But that's all it did. It just looked great. It didn't really do anything more than that. Now we did have a component where highlighted our process that people liked and they said it was a good tool for explaining to them what it is that we did and how we were different. So there was that going for it. But that was about it. That was all it did. And then it really-, if somebody called me up from that it was, you know, it was because they were really, really eager and really motivated to get together with somebody. But it really didn't do much more than that.

But you see, at that point I didn't really know what I was doing. The reason the costs were so high is because I was hiring companies to do it for me. I've always been a believer in outsourcing and hiring, hiring for what you don't know what to do or don't how to do it. And I really placed my fate in their hands. Now as a boutique financial planning firm and as a boutique fee-based financial planning firm, we didn't have huge dollars to put into marketing. So whatever we did we needed it to work. Now putting the \$8,000 and the \$5,000, putting that level of money into the-, that was a big deal for us at the time. That was a huge step. I remember having meetings with my wife and partner and saying look, you know, is this really what we want to be doing because it's a lot of money, but I think it really is what we need to do. And it was the right thing to do at the time, but if I could do it all over again I would do it completely differently.

However, having a website is critical to your future success. So listen up and learn from my experiences. I figured out why the marketing firms make so much money. I figured out their business model. Now I know that if you're in marketing or if you're listening to this and you are part of a marketing firm or whatever you're going to get angry with me for saying what I'm about to say. But I don't care. It's my money, my business, and my future. Marketing firms will put together great eye-popping material that makes you feel like you have finally arrived. It makes you feel so proud to show your friends and family. It makes you feel like you've just taken the next step in your career. And you know what? It doesn't make any difference. Because



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it doesn't do the job it's supposed to do, which is generate leads. It looks great, but it's like those wonderful post cards, those wonderful ads that you see in the magazines and the glossy, really professional looking ads. They don't generate any response. And that's what you need your website to do.

So what do you do? Well, strap on your seatbelt, because I'm going to take you through what you need to know to make a website look fantastic and that will generate leads for your business.

The fee-based financial planning website creation steps are:

Step number one – you need to choose your website name, also known as your domain name. A little thing that you put – and many of you already know this but I'm going to just go to the very basics of everything just because if you don't know this I want to make sure you get this. The little thing that you put after the www on a website and in front of the dot com or dot ca or dot org or whatever, is really what you-, it's called your domain names. It's called your website address. So you need to make that match what it is that you do. You need it to look and feel like an extension of your company.

Well, I would start with your company name. My company's name is Ironshield Financial Planning, so I chose www.ironshield.ca. I chose the dot ca for two reasons. First, it shows that we're a Canadian firm; it shows that it's a Canadian website. And that's important, because when you're dealing with-, you know, as a boutique financial planning firm, I can't deal with somebody in the States, I can't really deal with somebody in the UK or the Netherlands or India or whatever, so I don't really want-, I want them to recognise if they stumble across my site, I want them to see that oh, this is more of a Canadian site. I want people to know that it is Canadian-focused, because we all know, from a financial planning perspective, rules and tax laws and everything, they're different depending on the region that you're in.

So choose the extension based on the region that you're in, and choose the website name based on as it being an extension of your company. So ironshield.ca is simple, ironshieldfinancialplanning-, well it makes sense you'd use ironshield as a domain name. Now the extension is important to use. Now dot com really is sort of the industry standard and it's probably the most valuable. If you can-, if you find that the dots-, in my case the dot ca is the one that I chose, but I also looked for the dot com. Now unfortunately somebody else owns the dot com so I'm not able to do it, and they're not even using it, which really frustrates me.

But if you find that the dot ca or the dot com or dot org or the dot net are also available, I would buy those as well. And the reason for that is that sometimes people don't know what your website is so they don't remember what it is. And if you've got dot on, dot ca or you've got these other acronyms or whatever that end up at the end of the website, well, sometimes people go



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well let's just try dot come first of all. So if the dot com is available, buy it. Then if your dot ca or whatever is available, buy it as well, and then point them all to the same location. So in essence, if the dot com was available for me, I would simply buy the dot com, buy the dot ca, buy all the ones that I feel are appropriate, and then I would point them all. So if you typed in ironshield.com I would point it to ironshield.ca. So it's just really a forwarding, and there's very easy ways of doing that.

Now first off, start with a few renditions of your company name and see which ones are available. So what I would recommend you do is go to www.1and1.com, so the number one, and, and the number one, dot com, and search to see if the domain name you'd like is available. Write there on the homepage you'll see a free domain checker that you can use to see which of your desired domain names are available. So simply just go in, and if you think, you know, freedom financial, I wonder if it's available. So type in freedomfinancial.com and see if it's available. And then it will come up and give you a listing of what's available and it'll tell you if A, it's available, and if it's not available, it'll say it's not available but here are some other options that you can look at. So you'll be able to see very quickly what's available. And write down the most popular ones that you would like, and then if it's available, basically then once you've chosen the one that you want to use as your main domain name, then you're going to just simply go in and buy it.

Now, try not to make it too long, because you know, it has to go onto a business card. Now it's interesting, I say this but then I recognise as well that feebasedfinancialplanningmastery.com is not a very short one. But I chose feebasedfinancialplanningmastery.com specifically because it had all of the keywords that I wanted to be in the URL or domain name that I wanted, and so I chose it more for its keyword richness as opposed to identifying a company. Whereas ironshield.ca I chose it simply because it was a natural extension of the company, and so if you couldn't remember what my website was you'd say well let's try ironshield.com, and if it didn't work then you would say well ironshield.ca and so you'd be able to naturally find it that way.

So try not to make the domain name too long, but not too short either. Don't use, you know, like for Ironshield Financial Planning I could've used www.ifp.ca or ifp.com. Well, what is that? Nobody knows what that means. It's not a natural extension. So try not to make it too short but try not to make it too long. So for me, that's just the way that I worked through and that's why I've chosen the one that I did for Ironshield and that's why I've chosen I have for fee-based financial planning mastery. It's just-, look at it and ask yourself: what is a natural extension of my company name that I could use that people would probably think of if they were going to say. So if you want to test it just go to people and say if you know my company name what would you think my website address would be? And then see what that is.



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Then, purchase the domain. Okay, now a word of caution here. Purchase all of your domain names using the same company to purchase them through. So I use 1and1.com for all of my domain purchases, and that's why I'd recommend you use the same. Just go there, 1and1.com, open up a free account, and then purchase all of your domain names there. They're probably one of the cheapest, least expensive in order to do so, and they have a create auto-renew feature that allows you to set it up so that you cannot have to worry about missing a renewal date on your domain names, and somebody coming along and scooping it out from underneath you. Because once it comes up for availability, actually I think that somebody can come and just scoop it away from you. So watch out for that and set up the auto-renew feature with that in order to have that work for you.

So that's number one. Make sure you purchase everything through one company. So I use 1and1.com, I can choose-, I can purchase anything I need to there. Other ones you go and use GoData if you want to, that's another popular firm for doing that. I just find 1and1 is just simpler. Its navigation is less cluttered with advertisements and promotion and stuff like that, and it's just a very simple one to use. So open up your free account with 1and1, and then purchase your domain names through them.

Do not at this point purchase a hosting package. Now a hosting package in essence is where you're going to host your website. You've got to find a place on the internet you can actually host the website. Don't purchase. Most companies that you can purchase your domain names from will also provide you with hosting. Now I recommend that you don't use the same company that you buy your domains from to host your domains. And the main reason for that is that if you ever needed to change your webhost, it just makes it a little more difficult to move and migrate everything, because the migration process is very, very challenging in order to migrate your ownership of your domain from one registrar to another registrar. So I just keep it simple, I keep my registration on one place, and then I host on another place.

Now what you need to do in step two-, so we've got through step one, which is choosing your domain. So let's say you've got abccompany.com and you're all set to go; now you've got that. Now you can choose your webhost - this is step two, choosing your webhost. Now a webhost is a very important decision. You need to make sure that the webhost is stable. I mean it's the company that will actually host your website on the internet, so when you type in www.yourcompany.com it's the place you're going to go. And so you want to make sure that you... the company's got powerful servers, you want to make sure that they are available 24 hours a day, seven days a week, because sometimes you will have questions you need to get answers to and so you want to make sure that they're always available. The company needs to have fast, reliable servers that can handle the demands of a Search Engine Optimized website. And an SEO, or Search Engine Optimised website, is simply one that is set up to properly be found when people go to search engines to search for certain keywords and terms. As I said



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before, I'd never host my website with the same place that I buy my domains from. Too much risk if you need to make the change to your host, then you just don't want to have to migrate all your domains and whatnot. So it's a little challenging, take that advice and you'll be glad that you did.

So what I would recommend you do is go to www.feebasedfinancialplanningmastery.com and click on the toolbox tab. There you'll find a listing of the webhost that I've tested and am currently using, and that I recommend highly. They are 24/7, their support is knowledgeable, they'll help you incredibly. Especially in the next few steps that we're going to go through they helped me walk through it. I mean when I first did this I didn't know what I was doing. I called their tech support and I said guys, look, I don't know what I'm doing here, I know what I need to do, I just don't know how to do it. And he said, you know what, no problem, I'll just do it for you. Their hosting costs are dirt cheap, and they're recognised as one of the best in the business. So definitely take advantage of that. Go to the toolbox section, you'll see the link to the Bluehost that we use, and click on that and just go and buy your hosting account. And then when you set it up they're going to say okay, what's your company name and what's your domain name, and since you've got your domain name already you can just key all that information in and then they'll set the account up for you. And then you're really on your way to getting things set up.

So the webhost is a hugely important company. To start out with you don't need to go to some, you know, sophisticated web company. If your traffic-, if you do find, and I doubt you will, but if you do find that your traffic is just getting huge, you'll be notified by your webhost and they will say to you look, you're getting a lot of traffic, more than we can handle. Because the way that these servers are set up with the hosting company that we use, it's on what's called a shared server, so you don't actually own or have a server dedicated to you, you're sharing it with other people. And so when you're sharing it there's only so much capacity that everybody who's on that server has available to them, and so what happens is nine times out of ten everybody's not hitting everybody who's on that web server at the same time. So, you know, when some of the other people who are on the web server, maybe their website's not very active, and so when I've got a lot of activity on mine I just use some of their resource to handle mine because they're not using them.

So it's a shared service. And that's one of the reasons why they're able to keep their costs so down-, costs so low. But if you get a tremendous amount of traffic to your site for whatever reason, you may get a notification from the company saying hey, you're using more than your fair share of your resources, and if this continues we may need to move you to what's called a dedicated server. But don't really bother with a dedicated service at this point. It's too expensive, you don't need it, you're not going to get your return for your investment. Just stick with the shared hosting service.



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So now you've got your domain name, you've got your webhost, let's move on to your content platform, your website, the actual structure of your website. Now, what is a website content platform? Well, it's simply the software that you're going to use as the backbone of your website. Now this is a critical decision. It needs to be a supported, stable and user-friendly solution. Years ago, when I first started, pretty much everything was hand coded. If you wanted a page to look a certain way, they would hand code that page. If you wanted the next page to look a certain way, they'd hand code that page. And it took forever. And that's why it was so expensive to have a website developed, was that it required all these html coding and all this Java script, it required so much knowledge, at that point, and even to this day, I have no idea how coders do what they do.

But the bottom line is that everything had to be hand coded. And any time – I mean this was the most frustrating part – any time you wanted to make a small change to the text or to the phrasing or to... I don't know, maybe update your website with some content, it was-, you had to hire the company, the web company, they would go in, they would hand code it, they would add it, and it cost you hundreds of dollars in order to just make a simple update. And that was the most frustrating thing to me, was that it was so difficult. Every time I wanted to do anything, change a colour, change a spelling mistake, I'd have to contact the web company and say guys, you need to do this, they'd do it, they'd send me a bill, and I'd be like ugh, it's just not worth it. And so I would just-, you basically end up letting your website go stale.

Now today it's completely different. Now what you're doing is you're in control of your website, and this is where the power comes in. Because you have 100% control to the core infrastructure of your website. If you know how to use a programme like Microsoft Word, if you know how to use just a simple word processor, you can actually update and control your entire website. It's that easy. Now there's only one platform that I would recommend you use. One platform and one platform alone. And it's called WordPress. Now WordPress is the most widely used website content platform in the marketplace today. It's probably the most supported and developed for in the world. It's also simple to use, highly customisable, and very stable. Consider the companies that are currently running their websites on WordPress, using WordPress. I'm just going to give you a listing of them and I think you're probably going to recognise some of them. E-Bay, Yahoo, Ford Motor Company, The Wall Street Journal, Sony, People Magazine, Samsung, The New York Times, CNN. You think these companies require a stable platform in order to run their website? You bet they do. And they're using WordPress. The great part of it all – it's free. WordPress is an open source, free web content platform that you can just download and you basically use it for free. So you get all the power of a highly customised, highly stable, easy to use, simple web platform, that is search engine optimized, that is friendly with Google. It's already-, everything is all done. I mean when I first realised this, I couldn't believe all of this power came in a free programme.



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Now remember when I said it was important to choose a good webhost? Here's why we use the one that we do. They have a one-click install available to you when you host with them, for WordPress. And their hosting fees are ridiculously inexpensive. Currently I believe-, what are they-, I think they're running around \$5 a month to host your website on the Bluehost services. I mean it just-, it blows me away how inexpensive it is. For 60 bucks a year you're hosting your website. I was-, the company I was using before I was paying... I think I was paying close to 50 bucks a month in order to host my website with them. Anyways, our webhost that we're using right now, the \$5 a month one, it's already perfectly WordPress-friendly, they've got everything, the servers are finely tuned and tweaked for WordPress, and they've got that one-click install. So one of the things you'll do when you actually open up your hosting account is you open up your hosting account, you get to the bottom and they've got five or six different platforms you can use. And one of the platforms is WordPress, and you can say okay, I want this hosting, I want my website to be hosted-, to be-, the platform to be used, the website to be built on WordPress. So you click on the WordPress logo and it says okay, we're going to do a one-click install for you. You click install, it asks you what the name of your website's going to be, so it could be the name of your company, and boom, it's done. And then the next thing you know you go to your website and you type in www.yourwebsite.com and there it is, it's live, you're good to go, and you've got the core infrastructure already in place. Now it doesn't look very good at this point, it's very, very simple-looking; they've just got a very basic interface at first. But everything you need is there, and then you can go into the admin section, so basically what you do is once you've got it all set up you just simply go to www.yourwebsite.com/wp/, or sorry, wp-admin, hit that and it comes in with your user ID and login screen. What you entered as your user ID and login when you set up the account is-, you just type it in and all of a sudden boom, you're into the backend of your website and it looks like a word processor, and you control everything from there. So using our webhost right now, because of their one-click install, they're very, very familiar with WordPress, they're very, very familiar with everything that goes into that. Their tech support is great. I mean I had a situation where I basically went in and I did something and it didn't work, and the whole site just went down, it just didn't-, it just stopped working. I called them up and I said hey guys, I don't know what's going on, here's what I did. And they said yeah, no problem, I can see what the problem is here. They changed one little thing, I don't even know what they did, and suddenly it was back up. And this was like in the middle of the night, so having a 24/7 tech support is really, really handy.

So now, what have you done so far? Step one, we've got your domain name; step two, we've got your webhost; step three, we've committed to using WordPress as our platform, we've got it all installed. Now you've got a website. It's not a very good-looking one, but you've got a website.

So let's now make it look good. Now get ready for this. This one, you're going to love this. Because before, how did you make a website look good? You had to sort of think about it, design it, get your colours, you know, all this stuff. And then you had to somehow get that vision and



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image across to your web developer and then they would go in and they would design it and stuff and you'd go back and forth saying does it look good, does it not look good. You know what? Don't worry about this at this point. There are some easy, easy, simple, inexpensive ways of making a great-looking website.

The key at this point is to get your website up and running. Because is it just meant-, you know, is the key at this point to get a good-looking website or is the key at this point to get some leads generated from your website? Well, I would venture that it's about leads, so let's get the thing looking good, or good enough, and you're going to see that good enough is more than what it needs to be. I mean it's going to be overwhelmingly good. You'll see that it's very easy to make a good looking professional website. So here's what you do. So to make your website look good this is where I have in the past spent thousands and thousands of dollars. I'll never do that again. And neither should you.

There are two ways of making your site look good. You can go a free route, or you can go a really inexpensive route. I personally would choose the really inexpensive route, for a few reasons. First, it's really inexpensive, and I mean really inexpensive. Second, you get so many more features that you can use in the future that just make a lot of sense. And if you're serious and committed to building your fee-based financial planning practice, you know what? Spend a little bit of money. Now when I say really inexpensive, I mean like \$40 to \$100. Not a month, once. You spend \$40 to \$100 and you will give yourself probably... oh, I don't know, 30 different versions and completely graphic, good looking image-, you know, everything, for \$40 to \$100. I mean it's an amazing thing. Because if you go to our fee-based financial planning toolbox, under the WordPress premium themes you'll find the companies that we're using for making websites look good.

Now the entire fee-based financial planning mastery website is built on an out-of-the-box theme. Now let me just back up a second here. I'm using the word theme and I don't even think you understand what that is. In WordPress there's different ways of making WordPress look good. And when you create the look and feel of a website, it's the theme of the website. So what WordPress has is they have free themes that you can get just from launching it. I mean they've got hundreds and hundreds and you can scan through them. And it's very cool because all you do is you say look, I want my website to look like that, so you activate that theme, and now your website looks like that.

So, for example, if you... oh, I don't know, let's say you were coming up to Christmas and you say, you know what, just for fun I'm going to make my website during the Christmas holidays look very Christmassy, so I want all Christmas colours. You can just go in and say okay, change the theme so that everything is now red and green. And boom, it changes everything. It doesn't change your website; it just changes the theme of the website. So none of the content changes,



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nothing like that, and it happens immediately. Then you can change it back. If you want to give yourself a whole new fresh look just go to a new theme, say I want it to look like this, and boom. See, because the way it's set up is the coding and the infrastructure for the website, all of your menus, no matter what theme you use, they're the same menus. All of the content is the same content no matter what theme you use. So a change in the theme just changes the look and feel of your website.

Now there's free themes and then there's premium themes. A premium theme is simply a theme that you pay for. The entire fee-based financial mastery site was built on an out-of-the-box premium theme called Profits theme. Now this is fairly limited, but I chose the theme because it did exactly what I needed it to do for our site. Now would I recommend the Profits theme? You know, maybe, maybe not. What I would probably recommend is go to-, you'll see there's another option there for WooThemes. And if you click on that link it'll take you to their website. And I would highly recommend checking this out, because they've got hundreds of themes you can just scroll through and you can see what they look like right then and there. And just go through the templates and find the ones you kinda like the look and feel.

I mean pretty much every premium theme they have will have different renditions, so you can go to the theme, click on it, and then you can start playing with the different renditions, so the different colours and all that sort of stuff. You can customise it beyond that, but I'm talking when you're wanting it very simply and say my colours are blue and white. Okay, so click on the blue and white option for that website, it changes the whole website so it's blue and white, and now you've got the look and feel that you're looking for. So you can go in and do that with each one. And it's amazing. You can see it in advance, and then if you like it you can buy packages. So you can buy a package of three, I think, right now. When I did a quick search it was like \$40 for three of them, I think it's a special they've got on. When I did it I think I paid \$70 and I got three options. So you could actually choose three different of their premium themes, and then each theme has all these different renditions within it. So there's a tremendous number of options available to you, and all of them are really out of the box, easy to use. You just go in and say-, go to the colour section and say I want my colour theme to be these primary colours, and it changes the whole site.

Now in WordPress the look and feel of a site is called the theme. So remember that. So when I'm, talking theme it's like the template that we're using. Using the themes-, I would recommend the premium themes because not all the free themes-, what I did find when I was going through and checking them out, I found that the free themes, they did-, they were a little buggy, so to speak. What that meant is that I'd go there, I'd want it to do something, and then it just didn't look like I was hoping it would look. And so I found that, you know, what, maybe these free themes are being created but because they're free there's not a lot of energy and timing put into



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them. So by spending a little bit of money – and I’m talking like 40 bucks here – spending a little bit of money you get a premium theme.

Now what you’re getting when you’re getting a premium theme is you’re getting a quality premium theme that will provide you with a lot of flexibility going forward. You’ve got a huge building block, a foundation you can build on. So that’s a good thing. Secondly, as WordPress keeps getting updated – and it does, pretty much monthly – the premium themes guarantee that your theme will always work on the latest version of WordPress. And it will provide you with the updates as necessary. So we chose-, we were very happy with WooThemes because whenever there was a WordPress update, if they needed to change the theme that you had, and because there was a tweak that they needed to update it, they gave it to you for free. It just simply showed up on your list and said hey, there’s a new update for your theme, just click on this and it will update it. And it just instantly updates it. And as I said, when I ordered my first theme, I got three themes for 70 bucks, I mean it was amazing.

Now if you’re using [Woo] Themes, the one I would seriously take a look at is the Fresh News theme. Now it seems to be-, it just seemed to have everything that I was looking for. It seemed to have-, it was optimized properly, it looked good from an online marketing standpoint, it looked good from a professional standpoint, its layout was nice. It just seemed to have everything that I was looking for. So I would highly recommend you start with that one. If you’re going to choose one-, if you’re going to choose the first package where you get three themes, choose the Fresh News one as a good place to start. Because it seems to have a lot of flexibility. And I know other people who’ve chosen that, and then they’ve customised it and built on it as the building blocks. And they’ve done an amazing job with it.

So now where are we at? Now we’ve got everything set up, we’ve got your website hosted; we’ve now made it look good. And the great thing, again, is when you get the premium themes they’ll show you-, walk you through tutorials on how exactly to do it. And once you see how it’s done it’s just so simple. I mean you just simply click on activate and it just activates it. You say I want this theme, okay, where’s the theme, here it is, upload it, click on activate, and now the whole website’s changed.

So now you’ve got the website, you’ve got the hosting, you’re all set, you’re ready to go. But you got nothing in it, right? And you haven’t really branded it to your company. So now step five is where you start-, you’re going to incorporate your logo and tagline. Now do you already have a logo? Do you already have a tagline? I mean if you do, great. Simply upload it to the section in the theme that asks for your logo and it will suddenly show up on your website. However, if you don’t, you can do two things. First, I would recommend – and this is what I did – I would just type in your company name in place of the logo on the premium theme for now, and it will just simply put in text the name of your company. And often times because the tax is pretty well



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formatted it shows up and it kinda looks like a logo. So this will ensure that when people get to the site they'll know that they're in the right place.

And second, if you don't have a logo and want to get one, you're going to love this. Again, go to our toolbox, feebasedfinancialplanningmastery.com, go to the toolbox and you'll find a section for logo design. And you'll see the process we used for having our logo designed. So you'll see in the fee-based financial planning mastery website that logo that you see there, I didn't design it, I had somebody design it for me. And here's what I did. In using the 99designs, what you're going to do is, in essence, you pay a flat fee – and I think it's \$299 right now – so you pay a flat fee and then you put your design request out for tender. Now you'll get back 50 to 100 responses. But here's the cool thing. It's not just 50 to 100 people saying yes, I can build your design for you or I can do that. What they're sending you are logos. They're sending you complete designs before you even pay for them.

So what you end up doing is in 99designs you open up an account. It's free to open up the account, and then you put together your request. In your request it's going to ask you a lot of questions. What are the colours are you're looking for, do you want it to look more like this or like this, and it gives you all these different samples that you can say no, it's more like this, more like that, and you really go through the process. And it's like a wizard that it walks you through to get you to get clear on what it is you're looking for from your design. Then you submit it out there. It goes out to the marketplace and there's all these professional designers out there who were just looking at what new designs are coming through, are being requested. And then they say okay, this is what they want, they want primary colours, they want the logo to look like this, they want it to be in the shape of an F, they want it to be, you know... And it just gives everything they want. And then they say okay, here is my first draft, and they send you a draft.

Now when I did this, I think within about a half hour I had three or four designs to choose from. And within three days I had over 50 designs that I was having to choose from. It got to the point where it almost got to be too many designs. I was like whoa, you know, these are just-, there's almost too much to choose from. It's like when you go to a restaurant and they've got a huge menu and you're like I don't know, and then you ask the waiter well, what do you recommend. It's that kind of experience. But to be able to see all of the designs in advance, phenomenal. Then what you do is you narrow down your list of top designs and then communicate with those designers to tell them what you liked and didn't like about their designs. You get to tweak the designs.

Then the other designers who've been watching for a while will see those new designs come through and say oh, okay, I see where they wanted to go now. And then you'll have new people show up saying well, if you didn't like their first design and you wanted to go more in this direction, well then I've created a new design that's gone in that direction as well, here you go.



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And then you can narrow the list. And you keep going through this process until you narrow it down to a design that you love. Then once you've found the design that you love and you communicated with the designer and you've got everything in the size and shapes and everything that you need, you're going to basically say okay, I choose that design.

So you're going to choose that design, what that does then is you'll notify the designer that they won the design contest, and then at the point at which you exchange the money to them,, they then release the design to you. So basically that's what the company 99designs does is they're the third party that makes sure the transaction happens. So once the money gets released you get the logos. And then what I found was that the designer that helped us with our design, I was able to communicate with them after the fact and say hey, you know what, I love what we did and we did the design in this size, but you know what, I need it in a different size now. Can you just do that for me? And she just sent it to me with no cost, no added cost at all, and it worked great.

And now we've got a good relationship with that designer and it seemed to go pretty well, so whenever you're needing the logo designed, definitely check out that resource on the fee-based financial planning mastery website in the toolbox. And you will love it. It's an amazing process to think that you're actually able to see finished work before you have to pay for it. So, you know, times are changing. The way that the industry is moving forward, no longer are you getting a tender saying well here's what I can do, you're getting people saying well here's what I've done. And if you like it you can pay me for it. If you don't like then I'll move onto the next one. So it's pretty cool. Then simply take that logo, update it in your new premium theme web-, in the website, into your WordPress site, put it in the section where it says insert logo file here, click on upload, it puts it on the site, and boom, you're all good to go.

Now at this point you have a branded, hosted website, with no content. Now this is where we need to get busy. That process that we've just gone through pretty much takes-, well, other than the logo design, you can get your site up and running in about an hour. When I first did it it took me about a day because I was constantly on the phone with the tech support with the companies that I chose, with 1and1, with Bluehost and whatnot. But their tech support was great and they walked me through it.

So now the first page you want to create on your website is your About page. This is probably the first page people will click on when they land on your site. And remember, when they land on your site they're not landing on your site the way-, they're not going through the front door. Most people think oh, when you get to my site you go to the front door, which is the homepage. Often times they're not. They're coming in through a different page. I know that the majority of people that enter our site come through either the podcast episode or through one of the blog posts that we've got, and then they click on something to find out a little bit more about what the



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site's all about. So remember that. They don't normally enter through the front door. They usually come in through the side door or back door.

So remember they're going to find the website through search engines, and then when they get to your website they want to know let's find out a little bit more about what this website is. And so they'll go to the About page. On your About page I would put a picture of yourself. Find a picture that you like and use it for all of your online work; your LinkedIn profile, your Facebook page, your Twitter account, everything. Make sure that you use that, because it's going to become-, it's going to form part of your brand, and you want to use that as, you know, when people see it they'll know exactly it's you. So choose that head shot that you like and put it on there. Write about who you are and what you do and the purpose of the site. You don't need to be fancy, just get to the point. Just put a basic blurb that say hi, this is so-and-so, and just basically put a little intro into who you are, what the site's all about and what they're going to get from the site.

So that creates your About page. Now you want to start adding some content. Now in order to get the site up and running I would start with core information. We're talking fee-based financial planning. So what are some of the first questions that you want to be answering? What is financial planning? What is investment planning? Is financial planning different from investment planning? A lot of this information you can obtain from suppliers, your dealer, or just, you know, your own Google searching, where you can write a small post and link to the content you found on the internet. You don't have to create it from scratch at this point. We'll get to that sort of making it unique, but you just want to get the core information, just so that when people hit your site-, because they are going to start finding-, you'll be amazed at how quickly people will start finding your site just from searching around. Because WordPress is so Google-friendly, Google will index it very, very quickly, and anytime you post something it's going to put it into the Google search engine, and you'll be amazed how quickly people start finding it.

So put some core information. Core information, your beliefs, if you want to tweak it and customise it go right ahead and do that. Obviously don't plagiarise anything. If you're going to link to a-, if you found a site with some content that you like, some generic content, well then link to it and say you know what-, just make sure you link to it properly, put a little blurb, it won't take very long to do.

Now if you want to be inspired on what to write about – because one of the big challenges I find people have is that when they build a website they're like okay, what do I write about? What do I say? Well, if you are running into a writer's block sort of mentality, and you want to be inspired, check this website out. It's www.inboundnow.com, and click on the Apps and Tools link. Then click on the Kill Writer's Block app. This free app will provide you with a blog title idea generator, and you will just basically have to drop in your keyword that you would like to write



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about, and then it generates a title for you, and then you just simply write the post. So it's a pretty cool tool. Basically it's just a bunch of headlines that get created and you just keep on scrolling through them. And whenever you get to one you think okay, well that's one I could write that very quickly. Then you just go and you hammer out the post, and it's great.

Now in WordPress, to add a post – now a post on your site is basically just like you think it is, it's a posting, it's like one of your articles. A page to your website is like a landing page that you would go to that would house a lot of posts. So if you want to have pages grouped together, common posts, posts are just simply the content that goes into it. So if you know how to use Microsoft Word or Mac's Pages, then you know how to add a WordPress post. It's just a word processor, and it looks like one too. So when you go there click on Add New under the posts, you'll see on the left hand side you'll see Posts, click on Add New, and it will come up with a word processor page. You just simply write in the title, write the post, you can insert pictures, just like you'd be laying out a Word document. So go ahead and do that, and then it's just going to start updating the information. And you'll be amazed. As soon as you click update, go back to your website, check it out, and it'll be there. And it's pretty cool.

Now step eight. Now you've got the website set up, you've started to put some content into it, and people are starting to find it. Now this is critical. This is key. You want to add an email opt-in form to capture the leads on your site. Because the purpose for the website is to capture leads, is to build-, allow you to capture leads to build a relationship with them so that you can nurture those leads along – I've talked about that in previous episodes. Nurture those leads along so that you can begin to help them along to the point where when they decide that they want to get together with a financial planner they're going to think well, this guy's helped me along or this girl's helped me so much, I'm just going to give them a call. So you need to have an opt-in form to capture those leads on your site. Now it sounds complicated. It really isn't. It's very, very simple. Any good site will have an email opt-in form. So every site basically you get to the site, what's on the top right corner? An email opt-in form, with a little bit of a carrot that they offer to say hey, you know, sign up for-, register on this site and we'll give you a free report or something like that.

So the purpose is simple – to get more qualified leads. Adding this email opt-in is so easy. It'll probably take me longer to tell you how to do it than it actually takes to add one to your site. So let's get into it. If you go to our toolbox on the fee-based financial planning mastery website you'll see a link for the company we're using to manage our email list for this site. Go to Email Subscriptions and Marketing and click on the AWeber link. You can sign up for an account for a dollar, so it's basically an intro, sign up for a dollar to get things started. This is the best email delivery system on the market right now. Some of the most successful online marketers use this programme religiously. I mean I know guys that are online marketers, and they're generating I would say in excess of \$10 million a year. And their mail lists are 30, 40, 100,000 names on their



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list and it's all being managed through this particular service. This is a service where your ability to get your emails delivered is extremely high. Because remember, email services-, I mean you're going to be sending out lots of emails. And so you want the service to know what they're doing in order to get those emails delivered and not get those emails caught in spam filters. So using AWeber is simply a way of making sure that that happens.

The other thing that's great about this system is that it has what's called a double opt-in. And a double opt-in is really a great thing; because what it does is it gets rid of people who are giving you false email addresses. Okay? So let's just go through the process. You go in, you find the opt-in form, you put your name and email address there, and then what does it do, it takes you to a page and say great, thanks so much for registering, one more step. Go to your inbox and click on the link there, and this will confirm you are who you say you are. It's a way of making sure that the email address that somebody gave you, before they get the content you're wanting to give them, is actually valid, an actual real one. And so somebody actually has to go to their inbox – it happens instantaneously – they go to their inbox, they click on the link, and then all of a sudden they get sent right back to the content they asked for, and they're happy. What that's done is it's giving you a much better ratio of quality email addresses.

So now once you've done that, so you've got the double opt-in system working, and when you go into the system you're going to create your first list. So basically what you're doing is each one of your forms can be used to generate a different list of people. You can have all the forms, put everybody on the same list, or you can have different lists populated from different forms. So just start out your first one and you're going to create a first list. Something like call it website leads or something like that. Then it's going to walk you through the configuration of everything you need to do to make it work. When you get to the end of the Wizard – and really the Wizard is great - it just simply asks you questions, you answer all the questions, because you've got everything set up that we've gone through up till now, you've got it all set up. You'll be able to answer every question that it asks you. When you get to the end of the Wizard you're going to create an online email opt-in form.

So it's kind of interesting. The form is actually created through your email account, your email auto-responder account, not on your website. So you create the form using their Wizard. They've got a whole bunch of pre-done templates, colours, everything, you can customise it however you want. They create the form. And then when you're done you hit okay, give me the code for that form. It generates the code and provides you with all the information you need. You simply go and you block it all off, you copy it, you then go over to WordPress, you go into the... under... sorry, under the Appearance tab in WordPress. Go to the Appearance tab, you're going to see an option for widgets – and a widget is simply a thing that you're putting on your website, and you can put widgets all over your website. Well, this widget is your opt-in form. So you simply create a widget, you drag the text widget over to the space that you want the form to show up,



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you put it in there, it opens up the text widget, you paste in the code that was given to you from the opt-in form, click save, and guess what? You're now live. It's all set up and ready to go. When you go back to your website you'll see that opt-in form show up.

When setting up an opt-in form make sure you're enticing them to sign up because of some great content you're going to give them for free. So something like a free report or a free piece of information or a free something, you know. You just simply want them to get something for signing up, and so it's really just your way of lead generation. So you're going to have-, you're going to develop some six-, you know, like I've got six mistakes retirees make, you've got all these other different things. Really just create your own. Use the Kill Writer's Block generator if you want to create some content that you want to give away for free. It could be four classic investment mistakes all business owners make, or something like that. I mean we've talked about it before; there's so many ways you can create some great online content that people will be interested in, and then you offer that content in exchange for their email address and their name and so on.

Then now you've got-, I mean right now you could stop right here and you've got everything set up. You've got everything you need in order to have people just find your site and set it all up. But now you can start adding things to your site. You can add testimonials to your site, for example. So on a homepage or you can create a new age of testimonials and then each testimonial can be a post. Just add the testimonial in; if you've already got the testimonial set up, great, if not, then you can go and get them [inaudible 0:56:38], so we'll talk about how to get good quality testimonials. And you just simply go there and you just keep on adding the testimonials. You can have 20 testimonials, add 20 different posts on your testimonials page and then link it to those pages. So it's very easy. You're going to start to see how simple it is to start developing and managing your website. And by setting up a premium theme it just looks good from day one. So it's pretty cool the way that works. So you want to add some testimonials to your site, that's step nine.

Step ten is now you want to add your social networks to your site. Again, very simple. All the social networks have code that gets created to customise it so that it will put like a LinkedIn button or a Google+ button or a Facebook button or a Twitter button or whatever, it'll put it and it will instantly link it back to your homepage. So adding the links to your social media accounts is also very easy as each one gives you the code, so go in, you can get the code, if you don't have a code you can very easily find a graphic of whichever button you want, and then just link that graphic to the page that you go to for either your Twitter account or your Facebook page or whatever.

In WordPress, again, you're going to click on the Appearance tab and then the Widget tab, and then that's going to bring you to the widgets section, you're going to drag the Text tab. That Text



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tab you'll probably use quite a bit because all of the code that gets generated from all the social networks and all the other places, the AWeber forms and stuff, it's html code, I don't know what it says, it's just all this gobbeldy gook as far as I'm concerned. But you copy it, you paste it in, and guess what? It works. So that's how you'll do it there.

Then step eleven. Add a Contact Us page. So on this page you put your company name, your address, your phone, your fax, link directions to your office using a Google Maps link, your email address; any other ways and means for people to contact you, you can put it on there. Another thing you may want to consider doing is put your opt-in forms on your About Us page, on you Contact Us page, nothing wrong with doing that. I've had a lot of people sign up for a lot of the content that we've created through our About Us page.

Now you have a live, operating website now that looks great, it's full of quality content, and is now something you can build upon. Use the tools above and set yourself a weekly or bi-weekly goal of adding new content to your site that you feel it's important for your target audience.

Now this is the hard part. A lot of people feel that they don't want to launch a site until they have all the content put together. You know what? Forget about that. People will-, the content on sites gets stale pretty quickly, and so you want to constantly be updating it. So what I would do is every week just set yourself a goal that you're going to put one piece of new content on every week. And if you do that, by the end of three to six months you're going to have lots of content on there and it's just going to be amazing how the site is just going to start to grow and how people are going to start finding it more and more. Because you're using Wordpres and it's all integrated with Google, Google loves indexing a WordPress site. And if you set it up properly like I've just told you to, you're going to start seeing people come to your site as a result of Google.

The process I have just taken you through took me about a day to set up in its entirety. Now it doesn't include the backing and forth with the logo design and all that, but because you're using WordPress it happens very quickly, it's very, very simple to do. At the end of the day I could probably set up a brand new site from scratch in about three hours, and I mean totally, start to finish, in about three hours, with full content. Because it's just so easy to do.

There's so many ways of building a professions image without paying huge dollars. I've just shown you how to build a professional looking site with graphics, with logos, with everything, for under \$500. I mean think about that. And that's with full graphics. If you don't want to spend the money and go through time on having your logo designed, or if you've already got your logo designed, I'm showing you how to do it for, what does that work out to, basically \$60 a year for your hosting; the WordPress is free; You got your premium theme, let's say you paid 50 or 60 bucks for that. So there's just over a hundred bucks for the year, and you have a full, operating



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site that is on a trusted server, that is indexed by Google, that is all set to go. I mean that's how you do it. That's how you spend your money wisely. Setting up your email auto-responder and your opt-in forms and stuff, I mean it's a dollar to set it up, I think it works out to. I don't know, there's a monthly fee after that. But again, it's so inexpensive at the end of the day, because of the power. The one thing that you want to make sure you do with any website, the first thing you want to do, get your email list started. That's where you're going to start to build your relationship with your prospective clients. Because once you've got that email list started, you can then set up auto-responder emails that will go out on a regular basis, delivering more and more great content, and then it's all about content creation. And the content creation can actually turn out to be pretty fun at the end of the day, because you're writing about things that you like, you're writing about things that you want people to know about. You don't have to write novels, you don't have to write War and Peace. I mean you're just basically writing 500 words, 5 to 600 words is a good length for a good blog post. And do that. If you want you can even start posting, like I do with the podcasts, and so you get people to keep coming back to your site that way. I mean it's really pretty easy to do, so don't think it's complicated. Don't let the whole... you know, there's these companies out there that are saying oh, we'll do it all for you. I mean I spent thousands of dollars, and guess what? I manage all of this myself. So it doesn't take much. I've just given you everything you need to know in order to do that and to get started. And you know what? What's the worst that can happen? The great thing is that when you're starting out nobody knows your site's there in the first place. It doesn't take long for Google to start indexing it, but it means that you can stumble along and you're not going to be doing it on the... you know, with a lot of people knowing what's happening. So feel free just to go in and just start doing it. The people who get the results are the people that just do it, and then tweak it as they go. So there's so many ways of building a professional image and do it on an inexpensive way, do it with a good plane like we've just laid out for you here. Use the resources I've already tested. I mean don't reinvent the wheel. I've already got the hosting account, I've already got the platform, the WordPress platform, I've already got the place to buy your premium themes. All of that is just there; it's what I'm using right now. You're seeing it. Look at my websites, look at everything-, that's what I'm doing, I mean there's no secret here. So check that out.

And then your site will be up and running. So WordPress is optimized, Out of the Box for Google, every time you post something, very soon after you post it you're going to see people signing up for your content. So it's great. So just get out there and build yourself a better business.

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