SEO Audit Checklist for Financial Advisors

Work top to bottom. Tier 1 is whether Google can find and read your site, and nothing in the other tiers matters if it fails. Give each item an owner and a date. Compliance questions are for your compliance officer.

Tier 1: Can Google find and read your site?

	Item	Owner	Date done
☐	**Your key pages are in Google's index** Search Console: Page indexing report and URL Inspection. Check the home page, every service page and one bio.		
☐	**No page is blocked by accident** Check page source for noindex and visit /robots.txt.		
☐	**Each page has one address** Page indexing report: "Duplicate" reasons. URL Inspection shows Google-selected canonical vs yours.		
☐	**Old and missing pages are handled** Page indexing report: 404 and Soft 404. Keep a redirect list when you move or retire content.		
☐	**A sitemap is submitted** Search Console > Sitemaps.		
☐	**The site works on a phone** PageSpeed Insights, mobile tab. Then test the contact form on a real phone.		
☐	**Core Web Vitals are good** PageSpeed Insights: note LCP, INP and CLS for the home page, a service page and a guide.		
☐	**You know what you can change** Ask the home office in writing. Record the answers next to this item.		

Tier 2: Are the pages built to be found and trusted?

	Item	Owner	Date done
☐	**Every service has its own page** List your services. Tick each one that has its own page.		
☐	**Each niche you serve has a page** Match to your keyword map. See the keyword research guide.		
☐	**Every advisor has a bio page** Link to FINRA BrokerCheck or the SEC adviser database record, as applicable.		
☐	**Title tags are unique and say what the page is** Crawl the site (Screaming Frog free up to 500 URLs) and sort titles for duplicates.		

- [ ] **Each page has one H1 and clear headings** _____ _____
  Crawl export: H1 column. Look for missing or duplicate H1s.
- [ ] **Each page has a written description** _____ _____
  Crawl export: meta description column.
- [ ] **Pages link to each other the way a prospect moves** _____ _____
  Crawl and check inlinks. Orphan pages get at least one link.
- [ ] **Images are real and described** _____ _____
  Crawl export: images missing alt text.
- [ ] **Each page has one clear next step** _____ _____
  One call to action per page; the consultation page is reachable in one click.
- [ ] **Required disclosures are in place** _____ _____
  Compliance sign-off date recorded here.
- [ ] **No unsupported claims** _____ _____
  Your compliance officer decides. Record the review date per page.
- [ ] **Pages show a date and a review date** _____ _____
  Add or confirm "last reviewed" on every guide.

Tier 3: Local, authority and measurement

Item	Owner	Date done
☐ **Your Business Profile is eligible and accurate** Business Profile: confirm eligibility; no keywords in the name.		
☐ **Name, address and phone match everywhere** Include the address in your regulatory filings.		
☐ **Each office has its own page** One page per office clients visit.		
☐ **Local business markup is valid** Rich Results Test on each office page.		
☐ **Professional and directory profiles are current** Remove listings you do not control or that charge to be listed without value.		
☐ **There is a written review policy** Get the answer in writing before asking anyone.		
☐ **Conversions are tracked** Test each conversion by submitting a test inquiry.		
☐ **Search Console and analytics access is yours** Check owner and users in each account.		
☐ **You log how each new inquiry found you** One column in your CRM.		

Compliance record

Item	Owner	Date done

- [ ] **The review process for new pages and changes is written down**
  Archive each approved page version with its date.

Every month

Item	Owner	Date done
- [ ] **Check Search Console for new indexing problems, errors and sudden drops**		
- [ ] **Review the queries and positions for your target pages**		
- [ ] **Submit a test inquiry through every form and confirm it arrives**		
- [ ] **Check that bios, credentials and regulatory records are current**		
- [ ] **Send one page or guide for review and update**		

General information, not legal or compliance advice. Your compliance officer decides how SEC and FINRA rules apply to your pages. Full guide: thefractionalseo.com/industries/financial-advisors/resources/seo-audit-checklist-for-financial-advisors/