

PRESENCE AUDIT · FOR ADVISORS GOING UPMARKET

The Sniff Test

Before a referred prospect ever calls, they look you up.
This is what they find, and whether it earns the call.

01 THE PREMISE

You are looked up before you are hired.

Trust is the whole game, and most of it gets decided before you are ever in the room. Think about your own behavior. When was the last time someone recommended something that actually mattered, like a doctor or a contractor or an advisor, and you did not go look them up first? You did. Everyone does. That search is the real interview.

Here is how it works for you. A referral gets you in the door. It does not close anyone. You were referred for a reason, usually some version of your value proposition, the specific thing you are good at. The prospect takes that reason and quietly verifies it across everywhere you show up. If what they find confirms the reason, trust compounds and the call gets easier. If what they find is generic, contradictory, or simply absent, the referral leaks out the bottom and you never even know it happened.

The higher up market you go, the more this matters. Bigger clients do more diligence, not less. They have more to lose, so they look harder, and they are far more sensitive to a presence that does not match the introduction.

This document is a way to see your presence the way that skeptical, referred prospect sees it. Not how you remember writing your bio three years ago. How it actually lands today, across every surface, as one impression.

02 WHERE THE SNIFF TEST HAPPENS

Four surfaces. One verdict.

The sniff test does not happen on a single page. It happens across four surfaces, in about four minutes, and the prospect blends them into one feeling. Most advisors have never looked at all four together as a single system. The prospect always does.

01 · GOOGLE

The first move. They search your name, often with “financial advisor” attached. Whatever owns page one owns the story, whether you chose it or not.

02 · LINKEDIN

The professional read. Your headline and your About section either restate the reason you were referred, or they read like every other advisor’s template.

03 · INSTAGRAM

The human read. Increasingly checked even in finance. Does the person here match the professional on LinkedIn, or are they two different people?

04 · YOUR WEBSITE

The deepest read, when one exists. The place you fully control, which means a generic or stale site is the most expensive miss of the four.

03 WHAT A COHERENT PRESENCE REQUIRES

Five things have to be true.

Run every surface through these five. The audit prompt later in this document scores each one for you, but read them first. They are the standard the whole tool is built on.

01 Coherence

The same person shows up on every surface. Same value proposition, same audience, same promise. The fastest way to fail the sniff test is to be three different advisors across three different platforms.

02 Differentiation

Swap your name for any other advisor's. Does your copy still read as true? If it does, you are invisible. You have written the words that everyone in your category could have written. The reason you were referred has to be unmistakable, not implied.

03 Narrative Control

When someone searches you, do you own the story, or does the algorithm? Page one should be the narrative you would choose, populated by things you made, not things that merely happened to mention you.

04 Compliant Proof

Visible evidence that you do what you claim. For advisors this is where it gets delicate: the instinct is to reach for client wins, and that is exactly the wrong move. See the note below.

COMPLIANCE · READ THIS*Build proof without testimonials.*

Under the SEC Marketing Rule, testimonials and endorsements about advisory services are heavily restricted. So this audit builds proof a different way: your body of work, the consistency of showing up, credentials, third-party features and press, and educational content that demonstrates how you think. Compliant proof is slower to build, which is precisely why it is a moat. Your competitors will not do the patient version. (This is not legal advice. Confirm anything client-facing with your firm's compliance team before it goes live.)

05 The Sniff Test

The net effect. If someone referred you for your value proposition, and a skeptical prospect spent four minutes verifying, would they walk away more confident or less? This is the score that actually decides the outcome. The other four are the reasons behind it.

04 PASS 01 · THE AUDIT

Run this on yourself.

Gather your surfaces using the checklist near the end of this document, then paste everything into Claude (preferred) or your large language model of choice and run the prompt below. It scores you on all five dimensions, gives you a verdict, and names the single highest-leverage fix.

PROMPT 01 · THE AUDIT · PASTE INTO CLAUDE

You are a brand and presence auditor for financial advisors. You understand that for advisors trust is the deciding factor, especially moving up market, and that a referred prospect quietly verifies an advisor across Google, LinkedIn, Instagram and their website before the first call. You also understand U.S. compliance: under the SEC Marketing Rule, testimonials and endorsements are heavily restricted, so "proof" must never depend on client quotes about advisory services or performance.

Here is everything a prospect would find when they look me up:

- MY NAME:
- WHAT I WANT TO BE KNOWN FOR (the reason someone refers me):
- WHO I'M TRYING TO REACH (and whether I'm moving up market):
- GOOGLE (titles/snippets for my name + "financial advisor"):
- LINKEDIN (paste my headline + About):
- INSTAGRAM (paste my bio + describe my last 6 posts):
- WEBSITE (paste my homepage headline + opening copy, or "none"):

Audit me across five dimensions. Score each 1-10 with a one-line reason:

1. COHERENCE - same person on every surface?
2. DIFFERENTIATION - swap my name for any advisor's. Still true? Fail.
3. NARRATIVE CONTROL - do I own page one, or does the algorithm?
4. PROOF (COMPLIANT) - evidence without testimonials/performance.
Flag anything resembling a client endorsement as a risk to remove.
5. THE SNIFF TEST - after 4 minutes, more confident or less?

Then give me:

- THE VERDICT: one paragraph. Do I survive the sniff test today?
- THE ONE FIX: the single highest-leverage change. Not a list.
- COMPLIANCE FLAGS: anything that could trip the SEC Marketing Rule.
(You are not my compliance team, so flag it and tell me to confirm.)

Be direct. I'd rather hear it now than lose the client later.

Tip: take screenshots of your Google results page and paste those in too. The model can read them.

05 PASS 02 · THE REWRITE

Fix the weakest surface.

The audit tells you where you are leaking. This pass closes it. Run it right after the audit, in the same conversation, so the model still has the full context of what it just scored.

PROMPT 02 · THE REWRITE · RUN RIGHT AFTER THE AUDIT

Using the audit you just ran, rewrite my weakest surface so it passes the sniff test.

My positioning: [paste your positioning statement. If you don't have one yet, run The Positioning Blueprint first, then come back].

Rewrite [my LinkedIn About / my IG bio / my website headline] so it:

- says the same thing as my other surfaces (coherence),
- could only be me, with no line any advisor could claim (differentiation),
- makes the reason I'd be referred unmistakable in the first two lines,
- contains zero testimonials, performance claims, or specific product recommendations (compliance),
- sounds like a person, not a brochure.

Give me two versions, one tighter, one warmer. Then tell me which you'd pick and why.

06 BEFORE YOU PASTE

Gather your surfaces.

Five minutes of collection makes the audit ten times sharper. Open a blank note and grab each of these before you start the prompt.

- Your name, exactly as it appears publicly**
Including any middle initial or credentials you actually use.

- Your Google results**
Search your name + "financial advisor." Copy the top result titles, or screenshot page one.

- Your LinkedIn headline and About**
The full headline and the entire About section, pasted as written.

- Your Instagram bio and recent posts**
The bio verbatim, plus a one-line description of your last six posts.

- Your website homepage**
The main headline and the first paragraph of copy. If you have no site, write "none." That is itself a finding.

- The reason you get referred**
In one sentence, the thing people say when they send someone your way. This is the benchmark everything is measured against.

07 THE ROOT CAUSE

If the surfaces don't match, the leak is usually upstream.

When the audit says your presence is incoherent or undifferentiated, the instinct is to go fix the copy, rewrite the LinkedIn About, redo the bio. Sometimes that is enough. Often it is not, because the real problem is that there was never a single position for the surfaces to express. You cannot make four surfaces say the same thing until you have decided what that thing is.

That decision is what The Positioning Blueprint is for. Pick the lane first. Pressure-test it until it holds. Then this audit becomes simple maintenance. You are just checking that every surface still says the one thing you committed to. The two tools are a sequence: decide, then prove.

THE HONEST CLAIM

This won't build your reputation for you.

It tells you the truth about the one you already have, before a prospect does. The work of becoming someone worth referring is still yours. This just makes sure that when the referral comes, your presence confirms it instead of quietly talking the prospect out of the call.

Frameworks and credit: presence and trust thinking draws on classic brand coherence principles. Compliance framing reflects the SEC Marketing Rule (2021). Always defer to your own firm's compliance authority.