

PRESENCE AUDIT · FOR ADVISORY FIRMS

The Sniff Test

Before anyone decides to hire your firm, join it, or buy it, they look it up. This is what they find, and whether it earns the next conversation.

Your firm is looked up before it is chosen.

Trust decides everything, and for a firm most of it gets decided before any real conversation. Three different people look your firm up, and they are the three that matter most: a prospect deciding whether to hire you, an advisor deciding whether to join you, and sometimes an acquirer deciding what you are worth. None of them call first. They look.

An introduction gets the firm in the door. It does not close anyone. You were referred, or recruited into, for a reason, some version of what the firm stands for. That person then quietly checks whether the firm's presence confirms it. If it does, trust compounds and the conversation gets easier. If the firm reads as generic, or the website says one thing while the team's profiles say another, the introduction leaks out the bottom and you never know it happened.

The bigger the prospect, the better the recruit, the more serious the acquirer, the harder they look. More is at stake for them, so they do more diligence, and they are far more sensitive to a firm whose presence does not match its reputation.

This document is a way to see the firm the way those three see it. Not how the site read when it launched. How it lands today, across every surface, as one impression.

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 viewer blends them into one feeling about the firm. Most firms have never looked at all four together as one system. The people vetting you always do.

01 · GOOGLE

The first move

They search the firm name. Whatever owns page one owns the story, whether you chose it or not.

02 · THE WEBSITE

The deepest read

The firm's most controlled surface, which makes a generic or dated site the most expensive miss of the four.

03 · THE TEAM ON LINKEDIN

The consistency check

The founders' and senior advisors' profiles either echo the firm's story, or quietly contradict it.

04 · CONTENT AND PRESS

The third-party read

What the firm publishes, and what others say about it, is the proof that it does what it claims.

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 firm says one thing across the website, the team's profiles, and its content. The fastest way to fail is a site that promises one firm while the team reads like five unrelated practices.

02 Differentiation

Swap your firm name for any other RIA's. Does the copy still read as true? If it does, the firm is invisible. The reason a prospect picks you, or an advisor joins you, has to be unmistakable, not implied.

03 Narrative Control

When someone searches the firm, do you own the story, or does the algorithm? Page one should be the narrative the firm would choose, built from what the firm made, not whatever happened to mention it.

04 Compliant Proof

Visible evidence the firm does what it claims. 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 firm proof without testimonials.

Under the SEC Marketing Rule, testimonials about advisory services are heavily restricted, and that reaches the firm's own marketing. So build proof another way: the firm's body of work, its tenure and scale described carefully, the depth of the team, third-party press, and content that shows how the firm thinks. Slower to build, which is exactly why it is a moat. (Not legal advice. Confirm anything client-facing with your compliance team before it goes live.)

The score that decides it.

05 The Sniff Test

The net effect. If someone was referred to the firm, or recruited toward it, and spent four minutes verifying, would they come away more confident in the firm or less? This is the score that actually decides the outcome. The other four are the reasons behind it.

Run this on the firm.

Gather the firm's surfaces with the checklist near the end, then paste everything into Claude (preferred) or your LLM of choice and run the prompt below. It scores the firm, names the single highest-leverage fix, and builds a branded report you can download, plus a plain text version for compliance.

PROMPT 01 · THE AUDIT · PASTE INTO CLAUDE

You are a brand and presence auditor for financial advisory firms. For an RIA or advisory firm, trust is the deciding factor, and the three people who matter most all verify the firm online before any real conversation: a prospect deciding whether to hire you, an advisor deciding whether to join you, and sometimes an acquirer deciding what you are worth. They check your website, the founders' and team's LinkedIn profiles, what comes up on Google for the firm name, and whatever the firm publishes. You also understand U.S. compliance: under the SEC Marketing Rule, testimonials and endorsements about advisory services are heavily restricted, so "proof" must never depend on client quotes about advice or performance. Be direct. I would rather hear it now than lose the prospect, the recruit, or the deal later.

Here is everything someone would find when they look up our firm:

- FIRM NAME:
- WHAT WE WANT THE FIRM KNOWN FOR (the reason we get referred or recruited into):
- WHO WE SERVE, AND WHO WE WANT TO RECRUIT:
- GOOGLE (titles/snippets for the firm name):
- WEBSITE (homepage headline + opening copy):
- TEAM ON LINKEDIN (founders' and senior advisors' headlines, and whether they match the firm):
- WHAT THE FIRM PUBLISHES (content, social, press, or "none"):

STEP 1. Audit the firm in writing, here in the chat, first. Score each dimension 1 to 10 with a one-line reason:

1. COHERENCE - one story across the site, the team's profiles, and the content?
 2. DIFFERENTIATION - swap our firm name for any other RIA's. Still true? Then we fail.
 3. NARRATIVE CONTROL - do we own page one for the firm name, or does the algorithm?
 4. PROOF (COMPLIANT) - firm-level evidence without client testimonials or performance. Flag anything resembling a client endorsement as a risk to remove.
 5. THE SNIFF TEST - after 4 minutes, would a prospect, recruit, or acquirer be more confident in the firm or less?
- Then give me THE VERDICT (one paragraph, does the firm survive today?), THE ONE FIX (the single highest-leverage change, not a list), and COMPLIANCE FLAGS (you are not our compliance team, so flag it and tell us to confirm).

STEP 2. Then build a branded report as a single downloadable HTML file titled "The Sniff Test," using only what is in the audit above. Include the firm name and the date, a composite score out of 50, the verdict, the five dimensions each with its score, a thin score bar, the one-line reason and a Next Step, a dark One Fix block, and the compliance flags with a short disclaimer. Style it: parchment background #FAF8F0, near-black ink #211D18, cognac accent #8C6840, display font Cormorant Garamond, body font Inter, square corners, hairline rules, small-caps labels, no em dashes. Add an @page Letter rule, print-color-adjust exact, break-inside avoid on each block, and a fixed "Save as PDF" button that prints cleanly and hides on print.

STEP 3. If you can run code, also render that HTML to a true PDF with the fonts embedded and give it to me as a download.

STEP 4. Also give me a plain, black-and-white, text-only version of the whole audit, no color or graphics, that prints on any printer and is easy to forward to a compliance reviewer.

If you cannot create files, do all of STEP 1 as text, then paste the report HTML in a code block so I can save it myself, with the black-and-white version below it.

Tip: screenshot the firm's Google results page and paste it in too. The model can read it.

Fix the weakest surface.

The audit tells you where the firm is 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 the firm's weakest surface so it passes the sniff test.

Our position: [paste the firm's positioning statement. If you don't have one yet, run The Positioning Blueprint on the firm first, then come back].

Rewrite [our homepage headline / our About page / the founders' LinkedIn headlines] so it:

- says the same thing the rest of the firm's surfaces say (coherence),
- could only be our firm, with no line another RIA could claim (differentiation),
- makes the reason we get referred and recruited into unmistakable in the first two lines,
- contains zero client testimonials, performance claims, or specific product recommendations (compliance),
- sounds like a firm with a point of view, not a brochure.

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

Gather the firm's 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.

The firm name, exactly as it appears publicly

Including the legal name if it differs from the brand you market under.

The firm's Google results

Search the firm name. Copy the top result titles, or screenshot page one.

The firm website homepage

The main headline and the first paragraph of copy, pasted as written.

The founders' and senior advisors' LinkedIn headlines

Enough to see whether the team tells the same story as the firm, or several different ones.

What the firm publishes

Content, social, or press, with a one-line description. If there is none, write "none." That is itself a finding.

The reason the firm gets referred or recruited into

In one sentence. The benchmark everything is measured against.

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

When the audit says the firm's presence is incoherent or undifferentiated, the instinct is to go fix the website. Sometimes that is enough. Often it is not, because there was never a single position for the surfaces to express. You cannot make the site, the team, and the content say the same thing until the firm has decided what that thing is.

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

THE HONEST CLAIM

This won't build the firm's reputation for you.

It tells you the truth about the one the firm already has, before a prospect, a recruit, or an acquirer does. The work of becoming a firm worth choosing is still yours. This just makes sure that when the introduction comes, the firm's presence confirms it instead of quietly talking the person out of the conversation.

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.