✅Digital Marketing Checklist for Finance Firms.

Build trust. Get qualified leads. Grow with confidence.

Whether you're an IFA, mortgage broker, accountant, or wealth manager, your digital presence is critical for building trust and attracting the right clients. This checklist is designed to help financial services firms improve visibility, credibility, and lead generation - all while staying compliant.

Use it to:
✔ Ensure your online presence supports your brand and regulatory obligations
✔ Generate quality leads from ideal clients
✔ Track performance and stay ahead of competitors

🖥️ 1. Your Website

Your digital shopfront — first impressions matter.
[ ] Is your site secure (HTTPS), mobile-friendly, and fast-loading?
[ ] Are you clearly displaying your FCA registration or disclaimers where needed?
[ ] Do you explain your services clearly, with separate pages for each offering?
[ ] Do you include trust signals like reviews, testimonials, or accreditations?
[ ] Is there a clear call to action (CTA) — e.g. book a consultation or download a guide?

🔍 2. SEO (Search Engine Optimisation)

Be found when people search for advice you offer.
[ ] Are you targeting relevant keywords (e.g. "mortgage broker Northampton" or "pension advice UK")?
[ ] Are your titles, meta descriptions, and headers tailored for search intent and compliance?
[ ] Are you regularly publishing blogs or guides that answer key financial questions?
[ ] Are you using SEO tools (like Google Search Console or SEMrush) to track performance?

📍 3. Local SEO & Google Business Profile

Show up in local search when clients need nearby advice.
[ ] Have you claimed and verified your Google Business Profile?
[ ] Is it complete with services, office hours, photos, and compliance info?
[ ] Are you gathering reviews from satisfied clients (in line with FCA guidelines)?
[ ] Do you respond to reviews and enquiries professionally?
[ ] Is your business name, address, and phone number consistent across all directories?

💰 4. Paid Ads (Google Ads & Social Media)

Generate qualified leads from people actively looking for help.
[ ] Are you using Google Ads or LinkedIn Ads to target your ideal client profile?
[ ] Do your ads lead to finance-compliant, high-converting landing pages?
[ ] Are you filtering traffic with negative keywords or industry exclusions?
[ ] Are you tracking leads from each campaign — and checking lead quality?

📲 5. Social Media & Online Authority

Stay visible and trusted in a highly regulated space.
[ ] Are you active on relevant platforms (LinkedIn, Facebook, YouTube)?
[ ] Are you sharing compliant, informative content (e.g. guides, FAQs, market insights)?
[ ] Are you responding to comments and enquiries in a timely, professional manner?
[ ] Do your profiles link back to your website and highlight your credentials?

📈 Bonus: Strategy, Compliance & Tracking

Keep improving — with clarity and control.
[ ] Have you defined key goals (e.g. "10 qualified leads per month")?
[ ] Are you tracking conversions (form fills, downloads, bookings) by source?
[ ] Are you reviewing performance at least monthly with your marketing team or agency?
[ ] Are your marketing processes aligned with financial regulations (e.g. FCA, GDPR)?
[ ] Do you have content or offers ready for seasonal campaigns or market events?

🧾 Score Yourself

0–15 ticks → Start with the foundations: website, compliance, and visibility
16–30 ticks → Solid progress — now optimise, track ROI, and expand reach
31–45 ticks → Excellent! Stay compliant, strategic, and growth-focused

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Want Expert Help Reviewing Your Score?

Book a free digital consultation with a marketing expert who understands the finance industry. We'll walk through your checklist and suggest ways to improve lead quality and trust — without the jargon.

👉 [Book a Free Consultation]()