



AdvisorFlex Websites



CUSTOM WEBSITE DESIGN FOR RIAs

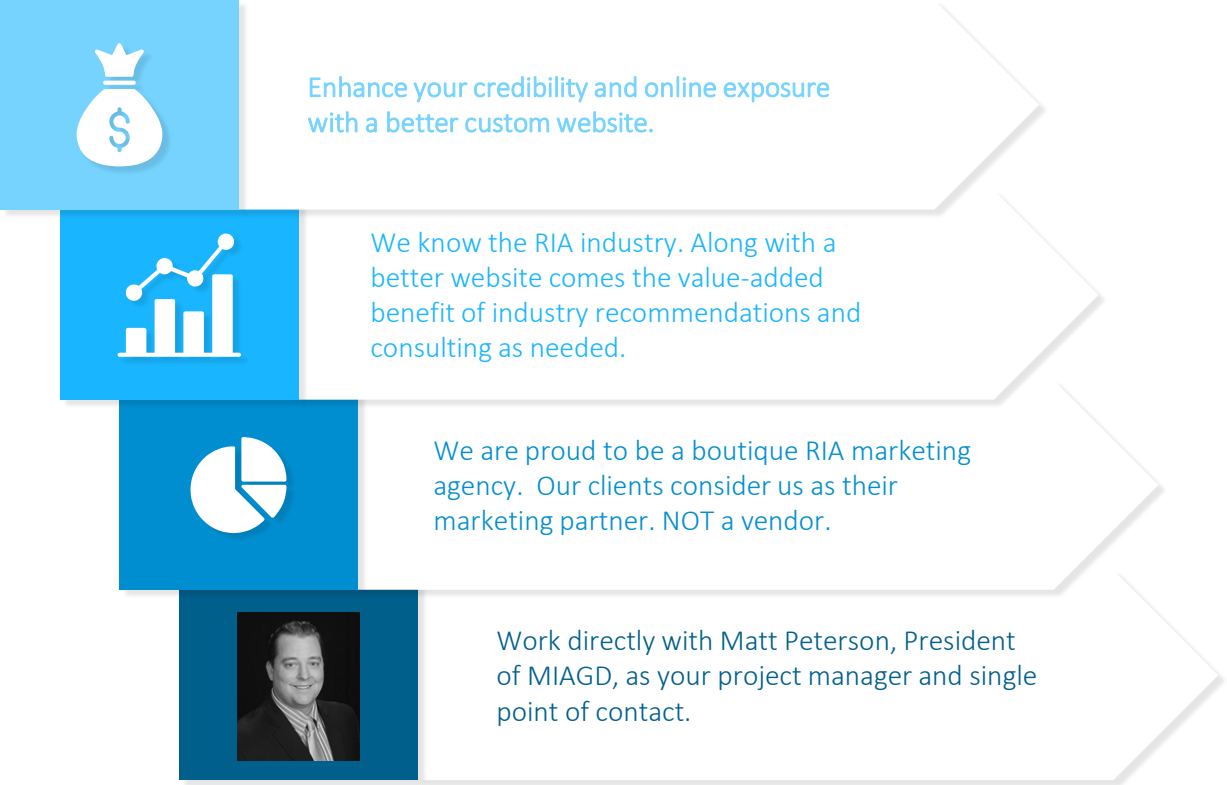
Simply better advisor websites. Since 2004.

Separate your advisory firm today with a unique website designed just for you.



CUSTOM WEBSITE DESIGN

YOUR BOUTIQUE EXPERIENCE



11,473

SEC-registered advisors managing \$66 trillion. [Source.](#)

14

YEARS. The number of years Make It A Great Day, Inc. has been assisting independent financial advisory firms.

3-8

NEW CLIENTS. Unlike our competition, since we ONLY work with Independent RIAs, we bring on a handful of new clients each month. We have *no interest* in onboarding hundreds of BD and Insurance reps.

1

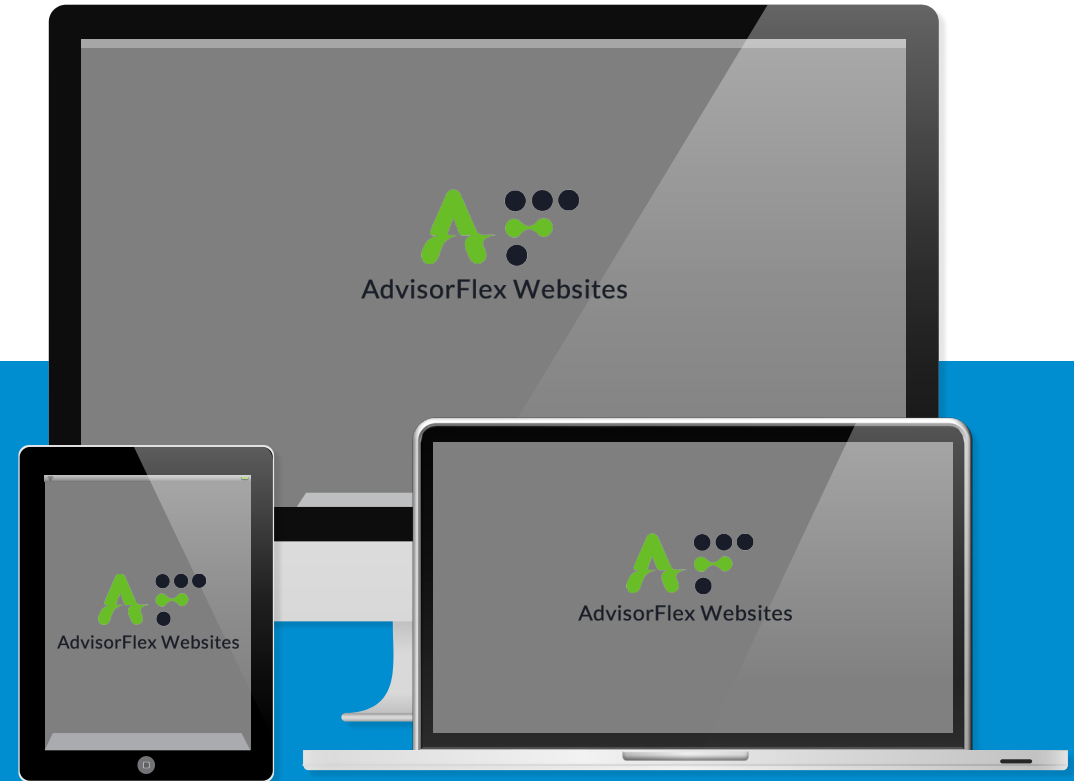
CONTACT. *Work directly with Matt.* The same way most of our clients typically work with their investors.

CUSTOM WEBSITE DESIGN

BEST-IN-CLASS TECHNOLOGY

RESPONSIVE DESIGN

Today's sites should be designed with both horizontal and vertical screens in mind. Based on the screen size everything should slide into place.



Save time and money by creating one *better* website that plays nice with every screen orientation and size. Not two separate websites or having to add on additional plugins. [See what we mean.](#)



Consumer **smartphone browsing** has well surpassed the desktop. If your RIA website is still not mobile friendly, you're missing the boat.



Your custom site is build on the **highest rated open source platform** available for website developers. Your site can easily be updated by you. Content updates are also included with website hosting.

CUSTOM WEBSITE DESIGN

OUR CREATIVE PROCESS

DISCOVERY

We'll get to know your RIA structure, offerings, investment approach and target market. We'll identify what you like and don't like from a design prospective. Suggest best practices, recommendations, images, menu and design ideas.

DESIGN

Usually within 10 business days we'll present a *private website preview*. Our goal is to get it 80% there, based on the info we obtain from our initial discovery calls.

MODIFY

During a full site walkthrough, we identify a list of recommended updates. After a few rounds of back and forth, our goal is to make this punch list shorter each time.

GO LIVE & PROMOTE

Upon compliance review and your final approval, we'll make your new website live at your domain. We'll also setup analytics, optimize for SEO and submit to search engines.



WE UNDERSTAND YOUR RIA

YOU WON'T FIND A MORE QUALIFIED MARKETING PARTNER, WITH BETTER SERVICE.



Matt Peterson

Matt began assisting independent financial advisors in 2004. He works exclusively with independent RIAs.

APPROACH



PASSIVE? TACTICAL? SOMETHING ELSE? We've got you covered. Use our custom website design services to weave your creative influence, through images and content, into the hearts of your potential investors.

FIDUCIARY? Please check out our competition first. Do the multiple sales or support associates, you might be dealing with, understand what the term 'Fiduciary' means? How about 'Independent' or 'Client First'?



YOU

FEES



FEE-ONLY or FEE-BASED? We understand your firm and how you make money. This helps us, help you, even more.

CUSTOM WEBSITE DESIGN

BUILT FOR YOUR INDEPENDENT RIA ADVISORY FIRM

INTEGRATION

Easily link to and integrate with your custodian, wealth portal and other 3rd party services. Like Riskalyze, Vestorly, Salesforce, etc.



EASY TRANSITION

Our easy transition process allows you to keep your current website up while we design your new one. No broken link errors.



ON-SITE SEO

Better on-site search engine optimization tactics are included with your custom design. Others charge for this as an add-on.



ONLY RIAs

We **ONLY** work with Intendent RIAs. Not BD reps. Not insurance reps. Just you!



A ONE STOP SHOP

CUSTOM ADD-ONS BUILT FOR YOU

CONTENT

Market commentary.
[learn more](#)



Custom website copy.
[learn more](#)



Custom written blog articles.
[learn more](#)



Educational articles.
[learn more](#)



PHASE TWO

What else do you need?



MARKETING



Content marketing machine.
[learn more](#)



On-site custom video production.
[learn more](#)



Marketing collateral.
[learn more](#)



Graphic design.
[learn more](#)



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