

The 90-Day AISEO Action Plan

A working checklist for RIAs and fintechs to win visibility in ChatGPT, Perplexity, Gemini, and the AI platforms your next client is already asking.

1. Audit Where You Stand

Days 1–7. Costs nothing. Takes an afternoon.

- ☐ Run the audit prompt on **ChatGPT**: “Describe [Firm Name] and what they do.”
- ☐ Run it again on **Perplexity**, **Gemini**, and **Claude**. Note differences across platforms.
- ☐ Ask: “List the top [wealth management / RIA / fintech] firms in [your category or region].”
- ☐ Ask: “Who are the best providers for [your core service]?”
- ☐ Ask: “Compare [Firm Name] to [Competitor Name].”
- ☐ Log whether each platform mentions you at all.
- ☐ Log whether the description is accurate.
- ☐ Log whether you’re recommended over competitors, and if not, who is.
- ☐ Save every response in a tracking doc so you can measure change month over month.

2. Restructure for Machine and Human Readers

Days 8–45. Build the authority signals AI checks for.

- ☐ Rewrite vague positioning into specific, quantifiable claims (not “holistic approach,” but real numbers and real segments).
- ☐ Audit your website, bios, and core service pages for generic language and replace it.
- ☐ Document custodian or platform integrations (Schwab, Fidelity, Pershing, etc.).
- ☐ List industry association memberships (FPA, NAPFA, XY Planning Network, etc.).
- ☐ Log conference speaking engagements and sponsorships.
- ☐ Track recognition in trade publications (InvestmentNews, Wealth Management, ThinkAdvisor).
- ☐ Publish consistent positioning across your website, LinkedIn, press coverage, and relevant directories.
- ☐ Confirm your messaging reads the same everywhere a prospect, or an AI model, might find you.

3. Build Proof AI Can Cite

Days 46–90. Turn a mention into a recommendation.

- ☐ Choose one proof point to build this quarter: a case study, benchmark report, or original research piece.
- ☐ Pull real numbers. Vague success stories don't get cited; specific outcomes do.
- ☐ Publish a short case study with measurable results.
- ☐ Or publish a benchmark report pulled from your own client or platform data.
- ☐ Or publish a point of view backed by results, not opinion.
- ☐ Distribute the piece across the same channels from Phase 2 so it compounds the authority you've already built.

Track These Monthly

- ☐ How frequently your firm is mentioned in targeted queries
- ☐ Quality of the mention (brief reference vs. detailed endorsement)
- ☐ Whether specific features or credentials are cited
- ☐ Your positioning relative to named competitors
- ☐ Referral traffic arriving from AI platforms
- ☐ Which URLs get cited most often

Need assistance implementing any of the recommendations you see here?

Get in touch with our team to explore how we can help you build your firm's presence where your prospects are looking.

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