



■ FOR FINANCIAL ADVISORS

Services & Pricing

Websites, compliance tooling, and growth services built for financial advisors, and for the regulatory record they answer to.

Websites

Compliance Tooling

Growth

Reg S-P Auditing

One foundation, built up in layers.

TIER 1

Launch

\$10,000 one-time

The complete custom website build, with every page engineered from the ground up to be found.

- ✓ **Full custom design & professional copy** on a conversion-focused structure.
- ✓ **SEO • AEO • GEO optimized:** rank in search, surface as the answer in AI assistants (ChatGPT, Perplexity, Google AI Overviews), and get pulled into generative results.
- ✓ **Lifetime build warranty:** if anything we built ever breaks, we fix it free — forever. (Covers our code. Issues caused by your hosting environment, third-party plugins, or edits made by others are billed hourly.)
- ✓ **You own it, you host it:** we deliver the complete site and support your team through go-live. Prefer not to manage hosting? Our Site Care plan handles it for you.

TIER 2

Turnkey

\$15,000 one-time

+ \$49/mo Log Vault

↳ EVERYTHING IN LAUNCH, PLUS

- ✓ **Admin center:** add, edit, or remove blogs, articles, and content yourself — no developer needed.
- ✓ **Books & records compliance log:** every change logged permanently (what, when, by whom), supporting your recordkeeping obligations under SEC Rule 204-2 (and, for dual-registrants, SEC Rule 17a-4 / FINRA Rule 4511).
- ✓ **Log Vault — \$49/mo:** your log is retained in immutable, write-once (WORM) storage that no one — including us — can alter or delete, with one-click and scheduled CSV exports to your compliance contact. Included free with the Site Care plan.
- ✓ **90 days of tailoring, free:** any larger changes or customization to the site or admin portal in your first 3 months, at no charge.

ADD-ON

Compliance Guardian

\$2,500 setup

+ \$299/mo

↳ REQUIRES TURNKEY

- ✓ **The AI Compliance Guardian:** a screener trained on FINRA and SEC advertising and communication rules that flags language that could raise a concern — before it goes live.
- ✓ **A smart first-pass filter,** not a replacement for your compliance team's sign-off. It saves the back-and-forth of copy that gets kicked back.
- ✓ **Always current:** we maintain the rule base and update it continuously as FINRA and SEC guidance evolves.
- ✓ **Every check logged:** each screening is recorded and exportable — a running record of your pre-publication review.
- ✓ **\$299/mo covers everything:** model hosting, the managed rule database, all usage. Flat rate, no metering, no surprise bills.



INCLUDED FREE WITH ANY BUILD

3 Years of FiduciaryCheck Plus

A premium listing on our advisor directory, putting you in front of prospects already searching for a fiduciary they can trust, feeding you visibility from day one.

Eligibility: the directory is reserved for fee-only advisors — firms compensated solely by client fees, with no commissions of any kind. Dual-registered (commission-earning) firms don't qualify for the listing; every other part of the build still applies.

\$0

fee-only firms

■ MAINTENANCE

Choose what fits.

Pairs with any tier, keeping the site current without a commitment you don't need.

SITE CARE • MONTHLY RETAINER

\$750 /mo

Everything that keeps the site live, healthy, and current:

- ✓ Front- and back-end hosting
- ✓ Uptime monitoring with proactive alerts
- ✓ Ongoing Google & Bing indexing
- ✓ Automated daily backups with restore
- ✓ Priority support — response within 1 business day
- ✓ Up to 3 hours/month of site changes and updates (additional time at \$175/hr)
- ✓ Privacy-first analytics (Plausible) with a monthly traffic report
- ✓ Security patches & dependency updates
- ✓ SSL certificate & domain management
- ✓ **Log Vault included** (\$49/mo value): immutable WORM retention of your compliance logs, with scheduled exports and full log delivery on request

HOURLY

\$175 /hour

Pay only when you need something. No commitment, billed against the work as it comes up.

Turn the site into a pipeline.

Two ways to run it — pick the engine that matches where the firm is now.

FULL SERVICE

\$6,500 /mo + ad spend

A full-service growth engine, run by us. The management fee is \$6,500/month; ad spend is separate and goes directly to the platforms, so you set the budget and stay in control.

- ✓ **Paid ad management** across Meta, Google, and emerging AI platforms (including ChatGPT ads).
- ✓ **Dedicated landing pages** built to convert each campaign.
- ✓ **Content & SEO:** topic strategy and a steady stream of blogs & articles.
- ✓ **Organic social media** management.
- ✓ **Video hooks & scripts** with AI editing — up to 5 videos/month (additional edits \$75 each).
- ✓ **Quarterly in-person shoots:** professional photo and video captured on location.

6-month minimum term · \$2,000/mo minimum recommended ad spend

ESSENTIALS

\$2,500 /mo (+ ad spend if applicable)

For firms that want momentum without the full engine. Choose your lane:

PAID TRACK

Ad management on up to two platforms, one dedicated landing page, monthly optimization & reporting. (+ ad spend, \$1,000/mo minimum)

CONTENT TRACK

4 SEO-optimized blogs/articles per month, organic social management, quarterly content strategy review.

3-month minimum term · Upgrade to Full Service anytime — your first month's Essentials fee is credited.

■ COMPLIANCE SERVICE

Reg S-P Compliance Auditing & Vendor Due Diligence

Custom scoped • engagements start at
\$3,500

With the SEC's amendments tightening how advisors must oversee third-party providers, the vendors you rely on are now your responsibility to vet.

We audit your third-party vendors and conduct due diligence on their technology and AI stack: how they handle and safeguard your clients' nonpublic personal information, where the data lives, and whether their systems meet the standard Reg S-P now expects. You receive a clear, documented assessment ready for your compliance team or an examiner.

Ready to build a site worth being found?

Tell us which tier fits, and we'll map the build, transparent layer by layer.

GET IN TOUCH

fiduciarycheck.com