WEALTH I/O

wealthio.com

AI SEARCH AUDIT · 2026-10-07

SAMPLE AUDIT · CLIENT DETAILS REDACTED

[Firm]

When someone near Newark and Columbia asks an AI assistant to find a financial advisor, does it name [Firm]?

PREPARED FOR

[Firm] ·

SCOPE

12 prospect questions · ChatGPT, Gemini, Perplexity, Claude, Google AI Overviews and AI Mode · public data only

PREPARED BY

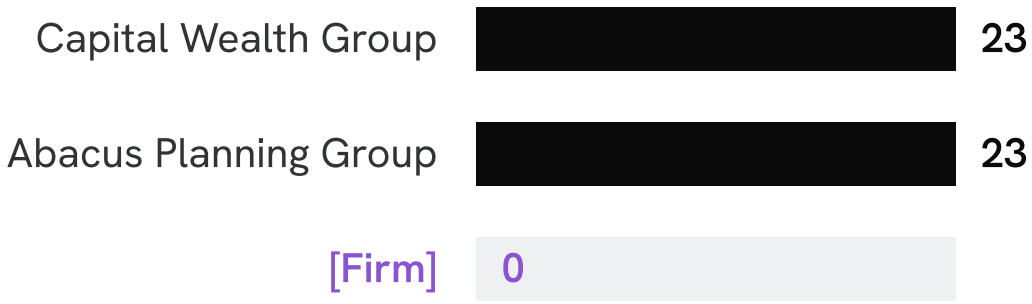
Wealth I/O · wealthio.com

AT A GLANCE

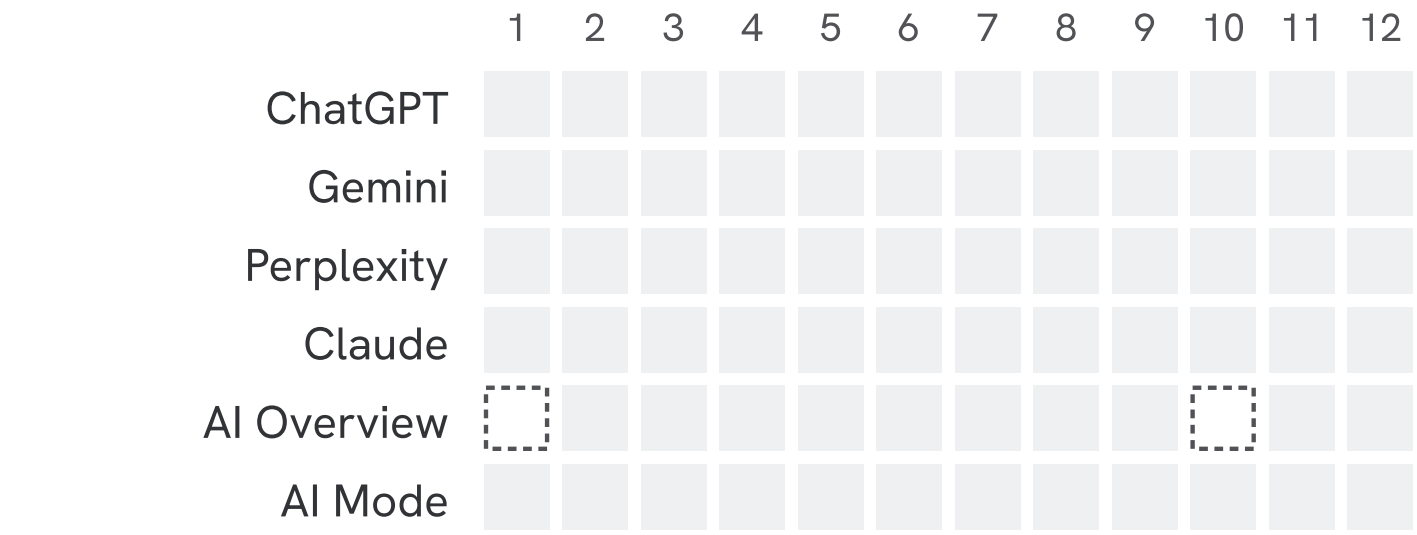
We asked 12 questions a prospect near the firm's offices might type, across 6 AI surfaces. [Firm] came up in 0 of 70 results. Capital Wealth Group came up in 23; Abacus Planning Group in 23.

A result is one question asked of one surface; where a surface was sampled twice, a firm counts if it appeared in either sample. Results that failed or showed no AI answer are left out, never counted as “not named”.

RESULTS NAMING EACH FIRM, OF 70



EVERY RESULT, ONE SQUARE EACH: 12 QUESTIONS ACROSS, 6 SURFACES DOWN



Named [Firm] · Did not · No AI answer shown, or not measured

0 of 12

questions where any surface named the firm

0 of 70

results that linked to [redacted]

10 of 10

results naming the firm when asked about it by name

Known by name, absent from discovery.

Asked about [Firm] by name, the AI surfaces named it in 10 of 10 results. Asked to recommend a local advisor, they named it in 0 of 70 results across 12 questions.

Gemini reads the map.

90 of Gemini's 185 citations were Google Maps listings. The [redacted], and no listing was found for Columbia.

Others hold the local answers.

Capital Wealth Group was named in 23 results and Abacus Planning Group in 23. Competitors' town and office pages were cited in 38 answers; its sitemap lists no town or office page.

1 · AI MENTIONS

Where [Firm] is named, question by question

● Named and linked to its site ● Named ● Not named – Google showed no AI Overview

failed Call failed, not measured

QUESTION	ChatGPT web · US · 2 samples	Gemini web · Newark and Columbia · 2 samples	Perplexity API · US	Claude API · Newark and Columbia	AI Overview Google · Newark and Columbia	AI Mode Google · Newark and Columbia
1 Fee-only fiduciary near Newark Newark, DE	●	●	●	●	–	●
2 Planning retirement income Wilmington, DE	●	●	●	●	●	●
3 Business owner planning an exit Philadelphia area	●	●	●	●	●	●
4 Finances after a divorce Main Line, PA	●	●	●	●	●	●
5 Small business 401(k) advisor Newark / Wilmington, DE	●	●	●	●	●	●
6 Advisor that takes smaller accounts Philadelphia suburbs	●	●	●	●	●	●
7 Fee-only advisor in Columbia Columbia, SC	●	●	●	●	●	●
8 Retirement planner in Columbia Columbia, SC	●	●	●	●	●	●

QUESTION	ChatGPT web · US · 2 samples	Gemini web · Newark and Columbia · 2 samples	Perplexity API · US	Claude API · Newark and Columbia	AI Overview Google · Newark and Columbia	AI Mode Google · Newark and Columbia
9 Plan plus portfolio management Lexington / Irmo, SC	●	●	●	●	●	●
10 Stock options and employee benefits Columbia, SC	●	●	●	●	–	●
11 Business owner in Columbia Columbia, SC	●	●	●	●	●	●
12 Divorce reset in the Midlands Midlands, SC	●	●	●	●	●	●

ChatGPT and Gemini were sampled twice on the web; a mark means named in at least one sample (hover for the count).

BY SURFACE

SURFACE	ANSWERS NAMING THE FIRM	LINKED TO ITS SITE	NOT MEASURED
ChatGPT web · US · 2 samples	0 of 24	0	
Gemini web · Newark and Columbia · 2 samples	0 of 24	0	
Perplexity API · US	0 of 12	0	
Claude API · Newark and Columbia	0 of 12	0	
AI Overview Google · Newark and Columbia	0 of 10	0	2 no AI Overview
AI Mode Google · Newark and Columbia	0 of 12	0	

2 · THE EXACT PROMPTS

The 14 prompts, word for word

The first 12 are discovery questions: a prospect in a named town asks for help with a financial situation, and none names the firm. The last 2 name the firm and are reported in one line only: asked by name, the surfaces named it in 10 of 10 results.

1	Who are the best fee-only fiduciary financial advisors in Newark, Delaware who do both financial planning and investment management?	**Newark, DE** fee-only fiduciary planning and investment management
2	I'm 60 and want to retire in the next few years. Can you recommend a fiduciary financial planner in the Wilmington, Delaware area to help me figure out retirement income and when to stop working?	**Wilmington, DE** retirement planning and income
3	I own a small business in the Philadelphia area and want to plan my exit in the next five years. Which independent financial advisors help business owners plan for selling the business and retirement?	**Philadelphia area** business owner exit planning
4	I'm going through a divorce and live on the Main Line outside Philadelphia. Which financial planners near me help people reset their finances after a divorce?	**Main Line, PA** financial planning after divorce
5	I run a company in northern Delaware and need a fiduciary advisor to help with our employee 401(k) plan. Which local firms around Newark or Wilmington do retirement plan consulting for small businesses?	**Newark / Wilmington, DE** employer 401(k) plan consulting
6	I have about $250,000 saved and live in the Philadelphia suburbs. Are there good fee-only financial advisors near me who will work with someone my size, not just millionaires?	**Philadelphia suburbs** financial advisor for $100k-plus investors
7	Who are the best fee-only fiduciary financial advisors in Columbia, South Carolina?	**Columbia, SC** fee-only fiduciary wealth management
8	I'm about to retire in Columbia, SC and need help with a retirement income plan and rolling over my 401(k). Which financial planners in Columbia should I talk to?	**Columbia, SC** retirement planning

9	I live in Lexington, SC and want one advisor who builds a full financial plan, including insurance, college savings and estate planning, and also manages my investments. Who would you recommend near Columbia?	**Lexington / Irmo, SC** comprehensive financial plan with investments
10	I work for a large company in Columbia, South Carolina and have stock options and a lot of employee benefits I don't really understand. Is there a CFP near me who helps employees make the most of them?	**Columbia, SC** employee stock options and benefits
11	I own a business in Columbia, SC and want a financial advisor who understands business owners, retirement plans and eventually selling the company. Which firms in the Columbia area do that?	**Columbia, SC** business owner planning
12	After my divorce I need to rebuild my financial plan from scratch. Which fee-only financial planners in the Columbia, SC area help with that?	**Midlands, SC** financial planning after divorce
13	What is [Firm], the financial advisory firm?	**Asked by name** brand control: what is the firm
14	Who runs [Firm], the fee-only financial planning firm, and what services does it offer?	**Asked by name** brand control: who runs it

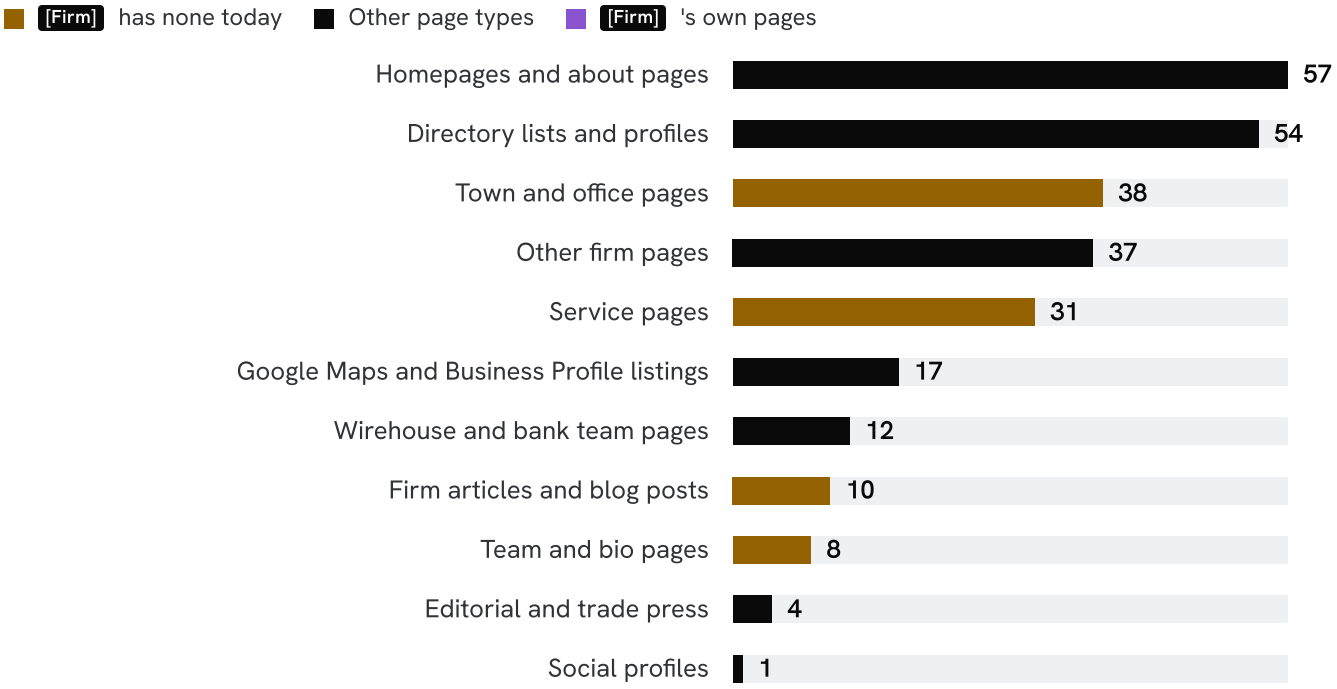
The other firms named

Results (of 70) in which each firm was named. Names were matched by exact name patterns, and similar names were kept apart unless noted; a mention can be context rather than a recommendation.

Capital Wealth Group was named in 23 results, Abacus Planning Group in 23 and Harper Financial Planning in 20; **[Firm]** in 0.

The pages the answers cite, and what to build

Discovery answers citing at least one page of each type. Amber marks the types [Firm]'s site has none of today.



Ordered by evidence, measurement first. We recommend the firm's CCO review each proposed page or listing before it is published.

WHAT TO BUILD, IN ORDER

1 **Measure first**

Add an “AI assistants” channel in Google Analytics and a “how did you hear about us” field, so later changes can be judged against a baseline.

Google Analytics 4: not found · referral-source field: missing

2 **Get listed where assistants look**

Examples cited: feeonlynetwork.com, napfa.org, plannersearch.org. Whether the firm is listed on these sites was not checked.

QUESTIONS: all

EVIDENCE: 54 answers

3 **Town and office pages**

Columbia **13**, Philadelphia **10**, Wilmington **4**, Irmo **3**, Lexington **3**, Main Line **3** and 2 more

QUESTIONS: all

EVIDENCE: 38 answers

4 **One page per client situation**

business owner exit planning **6**, business owner planning **5**, employer 401(k) plan consulting **5**, financial planning after divorce **5**, comprehensive financial plan with investments **2**, employee stock options and benefits **2** and 5 more

QUESTIONS: 1 2 3 4 5 6 8 9 10 11 12

EVIDENCE: 31 answers

5 **Complete the Google Business Profile**

Listing today: [redacted], Columbia: no listing found.

QUESTIONS: all

EVIDENCE: 17 answers

6 **Earn editorial and trade-press mentions**

Examples cited: money.com, investmentnews.com, kiplinger.com. Whether the firm is listed on these sites was not checked.

QUESTIONS: 1 3 8 9

EVIDENCE: 4 answers

7 **Fix the site plumbing**

2 site checks fail; see the technical summary.

5 · TECHNICAL SUMMARY

Site checks

AI crawlers may fetch the site and our test requests posing as them were served the full homepage. The items below are improvements to how clearly the site describes

the firm.

OK	AI crawlers allowed in robots.txt	all 7 AI crawlers checked may fetch the homepage
OK	AI crawler user agents are served the page	the homepage answered 200 with a full-size page to each bot user agent tested (spoofed user agents)
OK	Unknown pages return 404	a test address that does not exist answered 404
FIX	Structured data on the homepage	no JSON-LD structured data
FIX	Homepage has one H1, a title and a meta description	2 H1 headings; no meta description
OK	Sitemap present and on https	sitemap found with 6 page addresses, all https
NOTE	Canonical tag on https	the homepage declares no canonical address
OK	Http redirects to https	http:// answers 308 to [redacted]

Method

Answers were collected on 2026-10-07: ChatGPT and Gemini through their web versions (two samples per question; ChatGPT located in the US), Perplexity searching from the US, and Gemini, Claude, Google AI Overviews and AI Mode searching from the firm office each question was assigned to. A mention counts only when the answer ties the firm's name to something that identifies this firm (its town, office, people, domain or registered adviser), because other firms share similar names. A failed call is recorded as a failure and a missing Google AI answer as “no AI Overview”, never as “not named”; this is a sample of 12 questions, so the figures are counts, not rates. Public data only, with no access to the firm's analytics or Search Console, and not legal or compliance advice.

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