penta SERVICES

November 2026

WEBSITE GUIDE FOR FINANCIAL ADVISERS AND WEALTH PLANNERS

A financial adviser website that *earns trust before the first meeting*

Ready-made, fast and built to be found on Google and AI assistants. We adapt it to your firm, host it and keep it updated.



Ready Site · Corporate Website package

Live preview: advisers.pentaservices.co.uk

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TRY THE LIVE DEMO

advisers.pentaservices.co.uk

Aldermoor Wealth Partners is a fictional firm. Every name, figure, fee and review in the demo is a sample that we replace with your own.

£462m	1,155+	17	4.7/5
Assets under advice	Families and business owners	Years of independent advice	Average client rating

1 · AT A GLANCE

People check an adviser *carefully* before they call

Someone with pensions to sort out, a business to sell or an inheritance to plan searches Google, asks ChatGPT and compares advisers' websites. They want to understand what you do, what it costs and who they will talk to.

What visitors check

- Do you help with my situation?
- What will it cost, and is the first meeting free?
- Who will advise me, and how qualified are they?
- Are you regulated, and can I book easily?

What this website gives them

- Eight clear service pages with what's included and the fee
- A fees page with plan, ongoing and family office options
- Adviser profiles with qualifications and languages
- A booking form with dates, time slots and a reference number

25
Ready pages, including 8 service pages

2
Homepage styles

1
Savings growth calculator

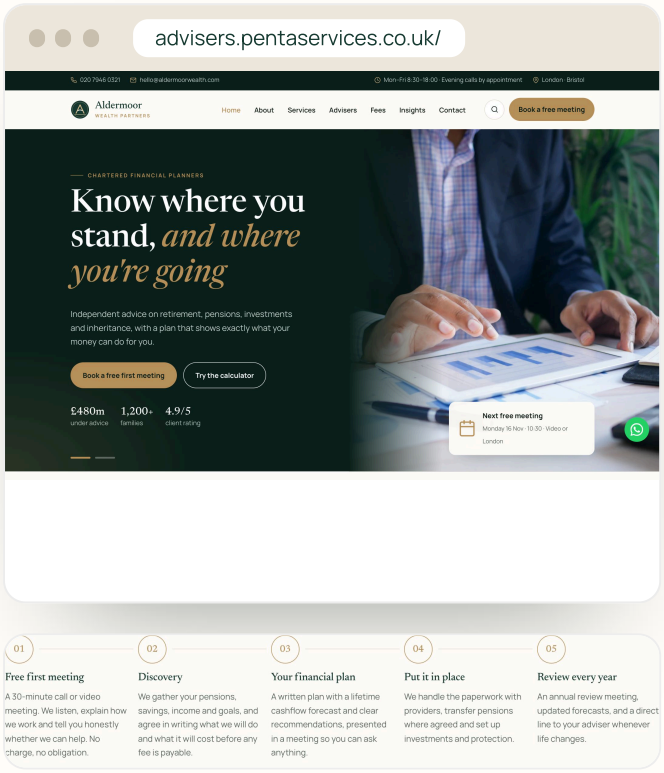
1
Booking form, one click away

Made for

Independent financial advisers (IFAs) · Chartered financial planners · Wealth managers and family offices · Pension and later-life specialists · Mortgage and protection advisers

The homepage, *section by section*

One page that answers the three big questions: what you do, why trust you and how to start.



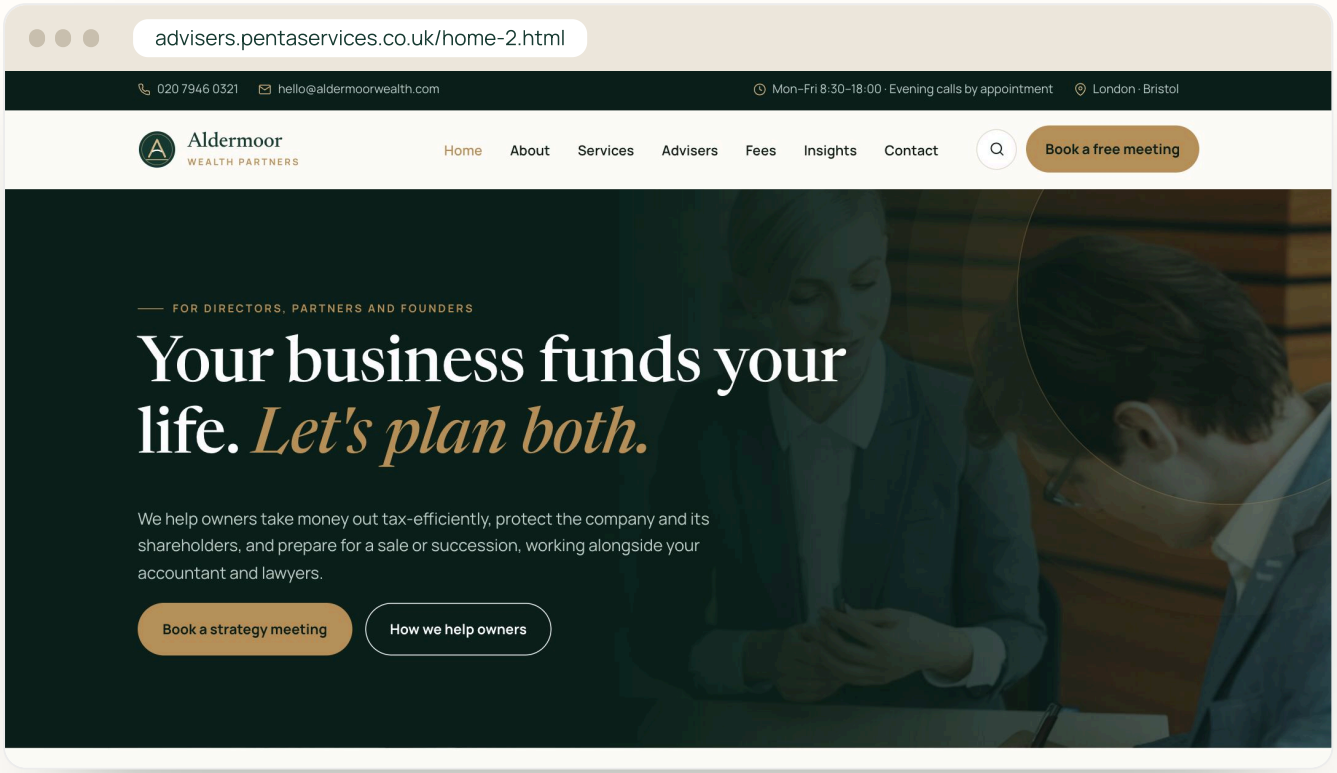
1. **Hero slider**
   Two messages (private clients and business owners), a free-meeting button and key figures you approve.
2. **Trust strip**
   Regulated, chartered, independent, fixed fees, responsible investing.
3. **Services grid**
   Eight advice areas, each linked to its own page.
4. **Why us**
   Your approach and promises, with photos and an anniversary badge.
5. **Savings calculator**
   Four sliders and a live illustrated value, with a clear risk note.
6. **Process, stories, team**
   Five steps from first meeting to yearly review, client stories and advisers.
7. **Reviews, FAQ, insights**
   Testimonials, the most common questions and the latest articles.

WHY IT MATTERS

Visitors decide in seconds whether a firm feels trustworthy. A calm design, clear fees and real people answer that question before they reach for the phone.

A second homepage *for business owners*

Directors, partners and founders have different questions. This page speaks to them directly and is ideal for advertising or a business-owner campaign.



1. **Business hero**
   Planning the business and personal finances together.

2. **Four owner services**
   Profit extraction, shareholder protection, exit planning, employee benefits.

3. **Exit readiness**
   A checklist for owners planning to sell in the next five years.

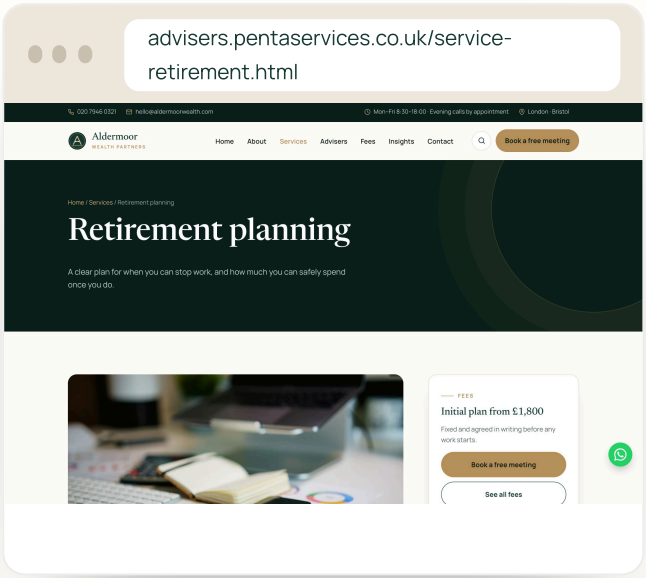
4. **Stories and team**
   Relevant client stories, the calculator and the business advice team.

Services and *service pages*

An overview of all advice areas, plus a separate page for each service, written to answer the questions people search for.



Services overview



Service page: retirement planning

1 **Service cards**
Photo, category, short description and starting fee.

2 **Find your starting point**
A table that matches common situations to the right service.

3 **What's included**
A checklist of what the client actually receives.

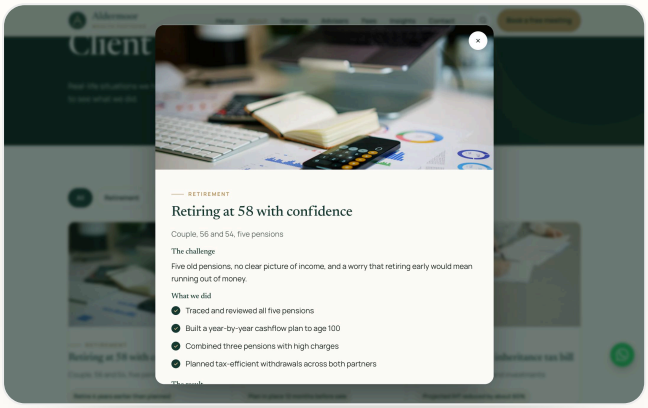
4 **Who it's for**
Who the service suits, in one paragraph.

5 **Fee box**
A sticky panel with the fee and a booking button that pre-selects the topic.

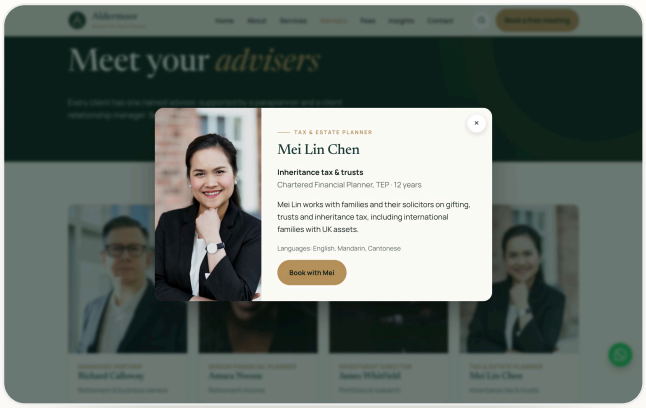
6 **Questions**
FAQs for that topic and three related services.

Client stories *and your advisers*

People choose an adviser as much as a firm. Stories show what good advice looks like; profiles show who will give it.



Client story pop-up



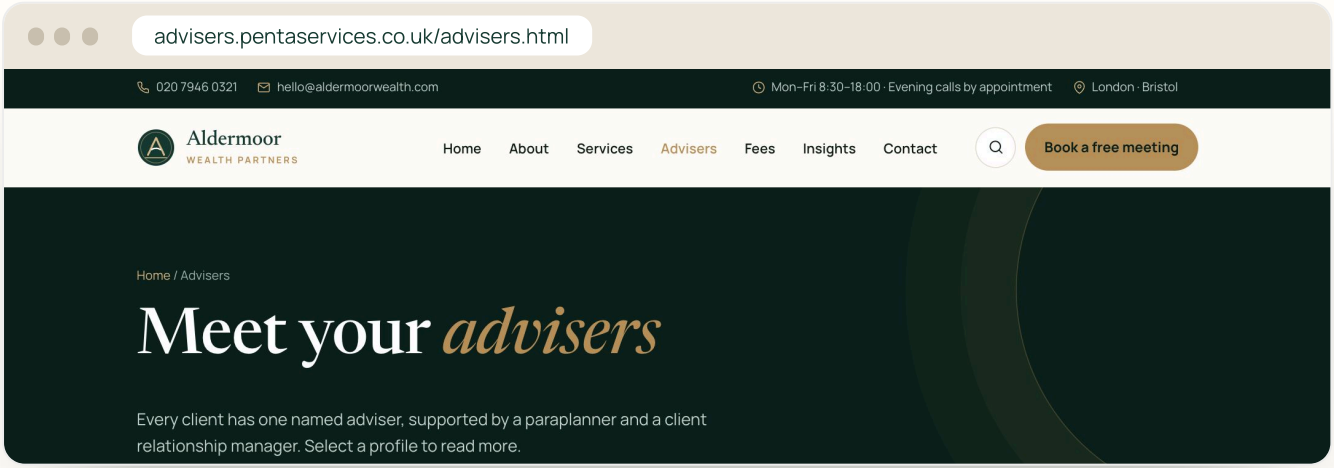
Adviser profile pop-up

1 Topic filters
Retirement, business, estate, protection, investments.

2 Story pop-up
Challenge, what you did, result and a key outcome, marked as illustrative.

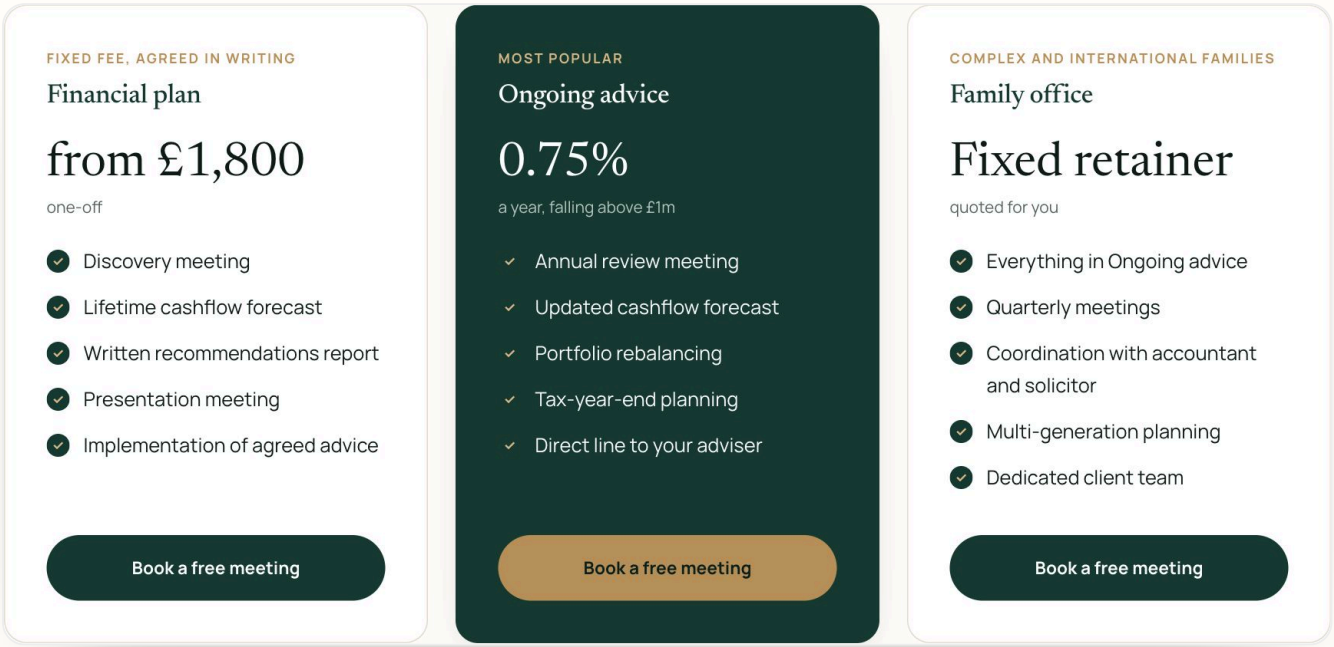
3 Profile cards
Photo, role and focus for every adviser.

4 Profile pop-up
Biography, qualifications, languages and a "Book with" button.



Clear fees *and online booking*

Transparent fees answer the question every visitor has. The booking form turns that confidence into a meeting in the diary.

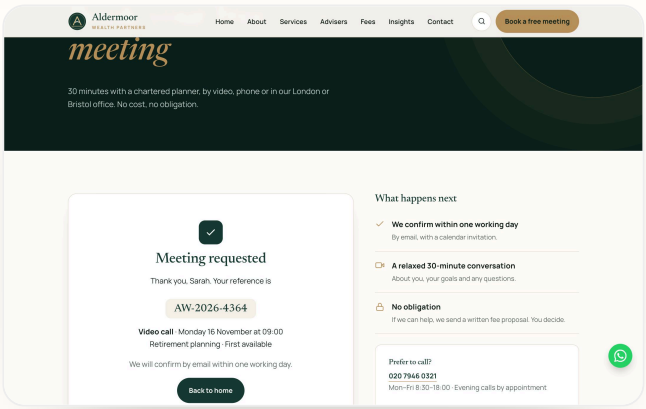


Fee options

1 **Three fee options**
Financial plan, ongoing advice and family office.

2 **Fees in pounds**
Rates by portfolio size with worked examples. Prices can also be hidden.

Portfolio value	Annual fee rate	Example yearly fee
First £1,000,000	0.75%	£250,000 → £1,875
£1,000,000 to £2,000,000	0.50%	£1,500,000 → £10,000
Above £2,000,000	0.30%	Quoted for you
Minimum yearly fee	-	£1,500



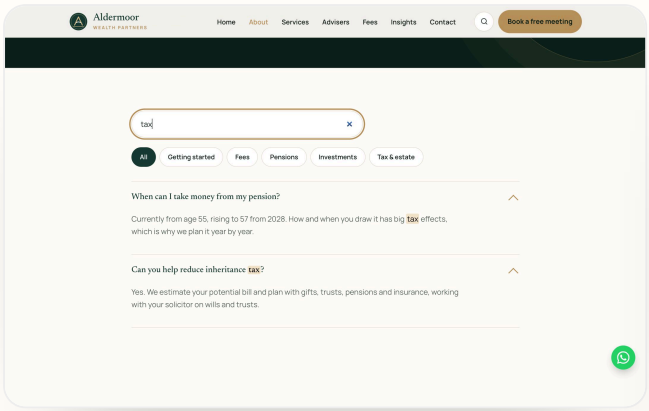
Booking confirmed with a reference number

3 **Topic, adviser, meeting type**
Video, phone or one of your offices.

4 **Dates and time slots**
Weekdays only, from tomorrow, unavailable times greyed out.

5 **Confirmation**
A summary with a reference number and clear next steps.

Answers, guides *and every way to reach you*



FAQ live search

1 Searchable FAQ

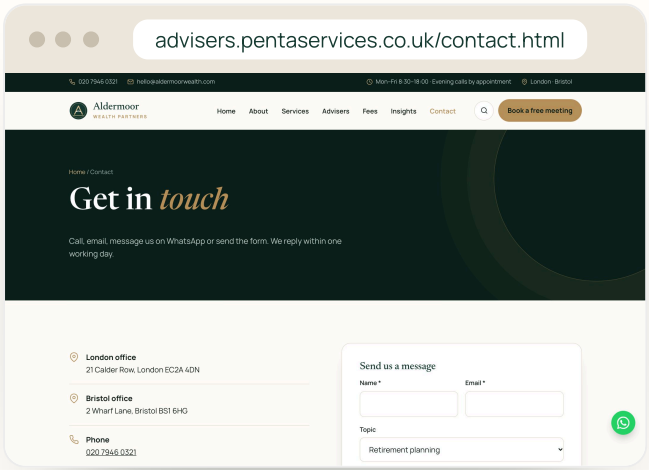
Visitors type a word: matching questions open with highlights. Topic filters and FAQ structured data.



Article page

2 Insights

Plain-English articles on ISAs, pensions, inheritance tax and fees, with topic filters, risk notes and a newsletter sign-up.

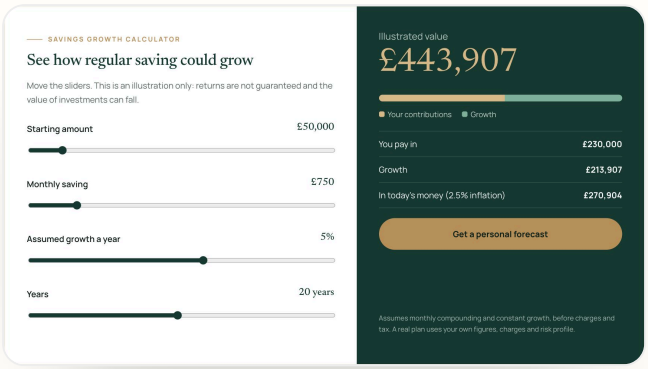


Contact page

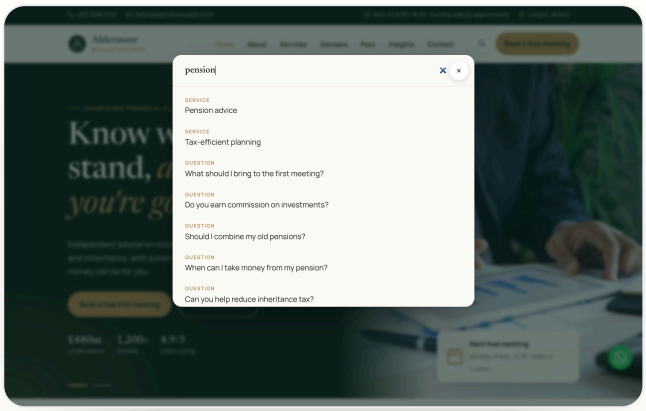
3 Contact

Offices, hours, a contact form and short panels for complaints, privacy and accessibility.

Features that *keep visitors engaged*



Savings growth calculator



Site search

Savings growth calculator

Four sliders, live results, contributions versus growth and the value in today's money.

Site search

Searches services, advisers, questions, stories and articles (also Ctrl/Cmd + K).

Regulatory footer

Space for your FCA number, risk warnings and complaints information on every page.

WhatsApp and phone

A WhatsApp button and tap-to-call number on every page.

Fast and light

Plain code, compressed images and quick loading on phones.

Easy to update

All content in one place: change a service or fee once and every page updates.

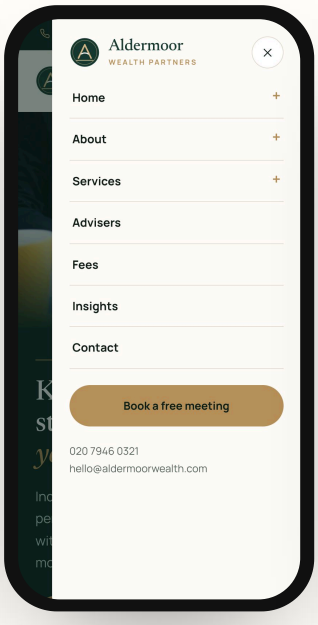
9 · MOBILE

Designed *for the phone*

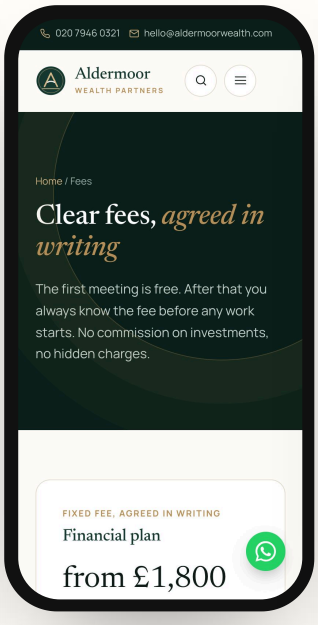
Most first visits happen on a phone. The menu folds into a side drawer, the calculator, fee cards and time slots become thumb-sized, and every phone number is tap-to-call.



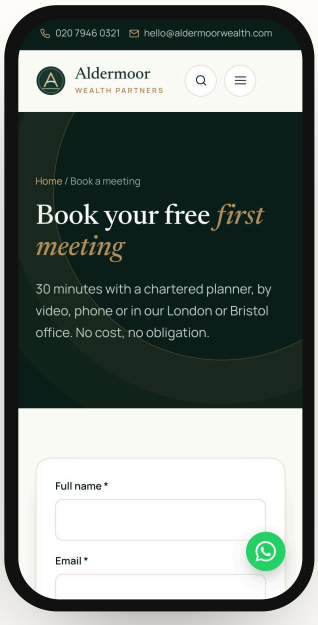
Homepage



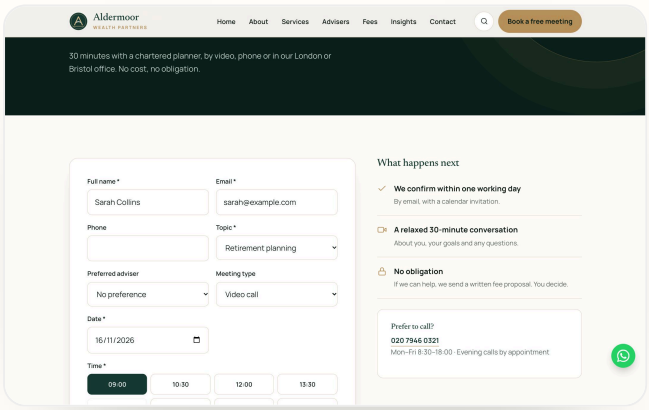
Menu

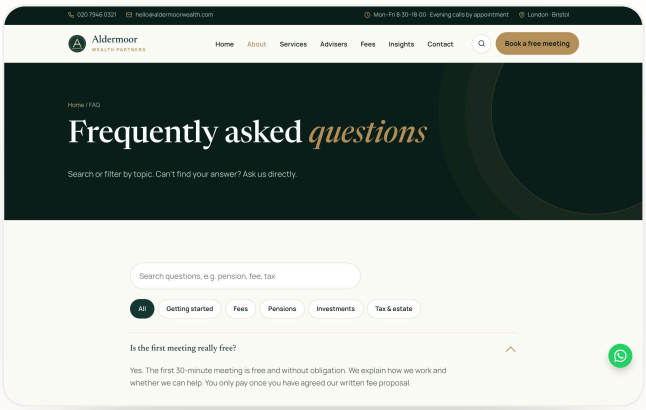


Fees



Booking





Your brand, *Google and AI search*

The demo uses deep green and brass on warm cream, with Newsreader for headings and Manrope for text: calm and premium, as people expect from someone they trust with their money. We replace them with your logo, colours and photos.

Google (SEO)

- A unique title and description on every page
- FinancialService, Service, FAQPage, Article and Breadcrumb structured data
- A separate page for each service
- Sitemap, clean addresses and fast loading

AI assistants (GEO)

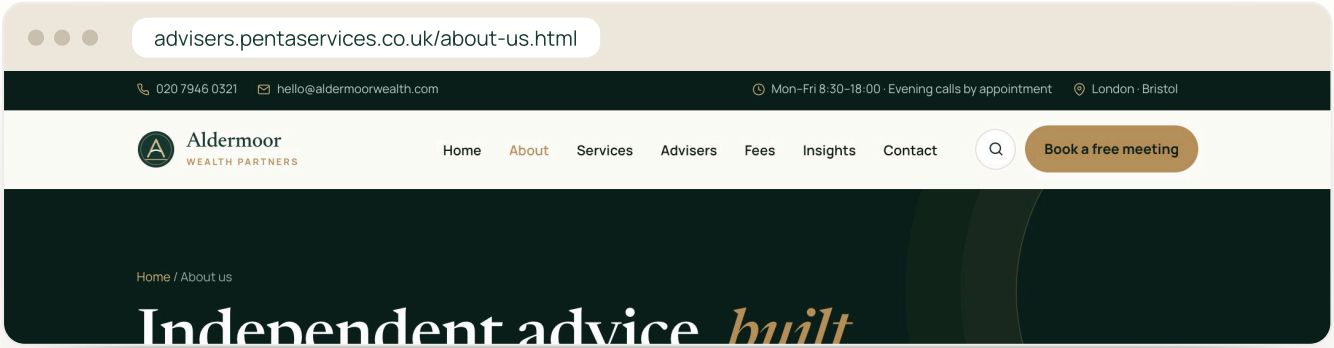
- Answer-first service pages and FAQs
- Plain-English articles AI tools can quote
- Consistent name, address and phone everywhere
- An llms.txt summary of your services

Searches the website is built around

financial adviser in [city] · independent financial adviser near me · retirement planning advice · pension advice for old pensions · inheritance tax planning adviser · how much does a financial adviser cost

WHY IT MATTERS

More and more people ask ChatGPT, Gemini or Google AI which adviser to contact. AI assistants quote sites with clear answers and consistent facts. We don't guarantee rankings or citations, but we report progress every month.



11 · ALL INCLUDED

Domain, hosting and email: *we take care of it all*

The website arrives complete and ready to use. You never have to deal with anything technical.

Domain INCLUDED
A free .com, .net or .org domain with yearly billing, or we connect yours.

Fast, secure hosting INCLUDED
Reliable servers, SSL certificate (https) and regular backups.

Business email INCLUDED
Mailboxes on your own domain (e.g. hello@yourfirm.com).

Updates and support
We keep the site updated and secure and make your changes.

Google Business Profile
Your Google Maps listing set up and linked to the website.

Privacy and cookies
Privacy notice and cookie consent for your country.

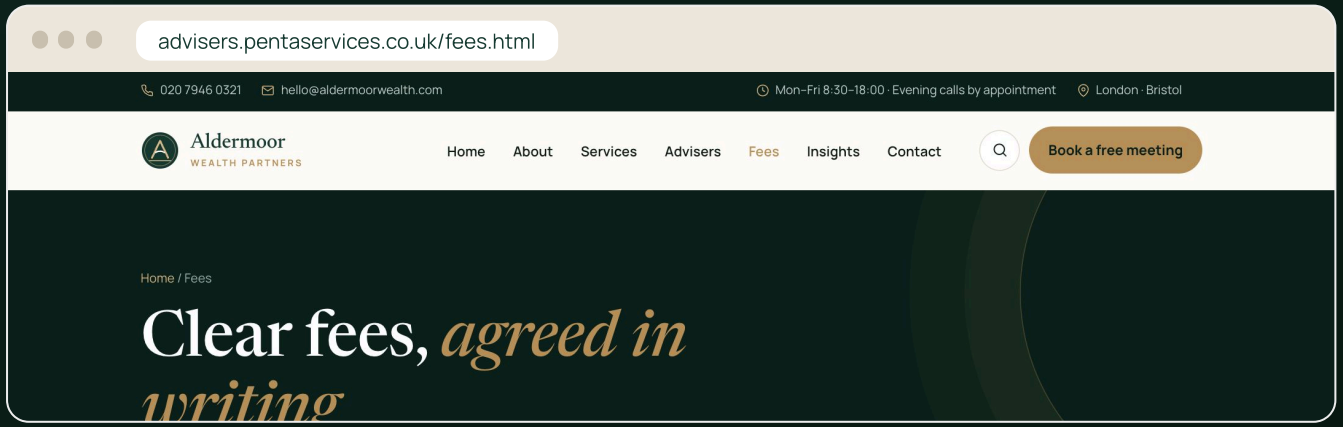
Ready Site price

Setup
£0 · US$0
Delivered faster than a custom build

Monthly
£34 · US$45
Hosting, SSL and business email included

Pay yearly
2 months free
10 × the monthly fee, plus a free domain

Ready Site prices for the Corporate Website package, November 2026. Prices in EUR, AED, PKR and other currencies on pentaservices.co.uk. 12-month minimum term from go-live.



What we need *and what we do*

What we need from you

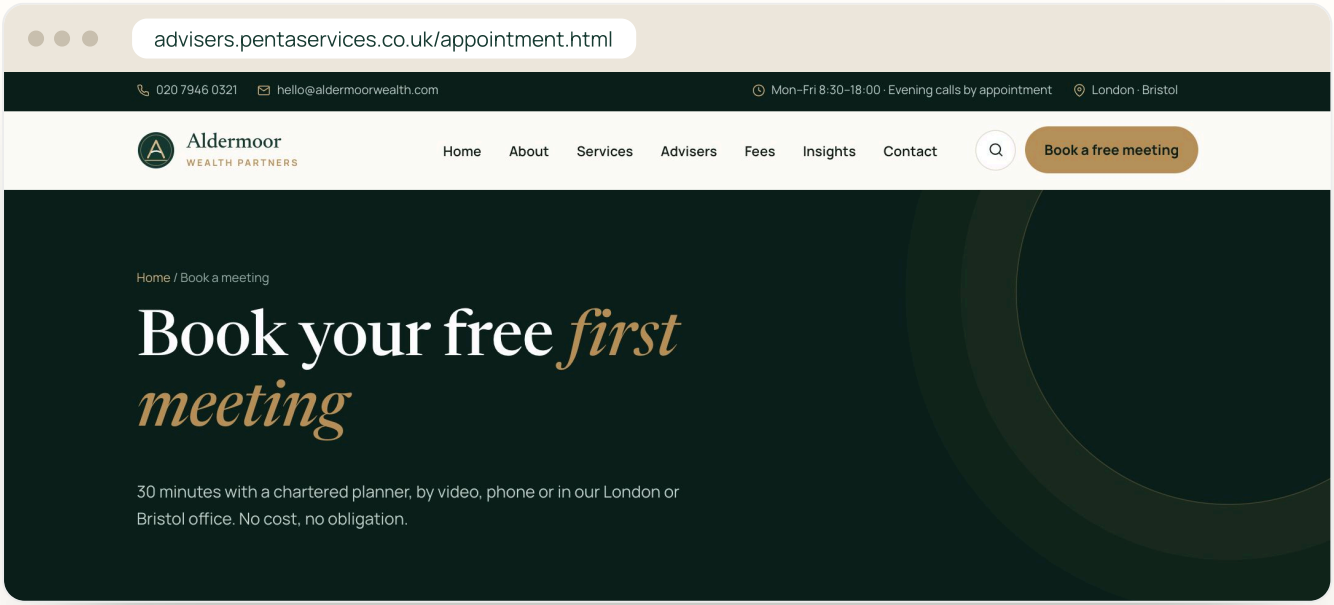
- Logo and colours, if you have them (otherwise we design them)
- Firm name, offices, phone, email and FCA details
- The services you offer and your fees (or "on request")
- Adviser profiles: role, qualifications, languages, photos
- Approved compliance wording and risk warnings
- Your current domain, or we register one

What we do

- Adapt the design to your brand
- Write and organise the pages with you
- Set up booking, forms and email
- SEO, structured data and Google Business Profile
- Test on phones, tablets and computers
- Go live on your domain, then look after it

TAILORED TO YOU

Every website is adapted to your firm: number of services, advisers, offices and languages. We send a clear proposal with no obligation.



NEXT STEPS

Ready to show clients *a website they trust?*

1. **See the demo**
   Open the demo on your phone and computer. Try the calculator, the booking form and the search.

2. **Talk to us**
   Message us on WhatsApp or email: we show you the site and answer every question, with no obligation.

3. **Send us your details**
   Logo, services, fees, adviser profiles and compliance wording.

4. **Approve and go live**
   You get a private preview link, approve it, and the site goes live on your domain.

Contact Penta Services

info@pentaservices.co.uk

WhatsApp / phone: **+44 7735 544911**

pentaservices.co.uk · Live demo: advisers.pentaservices.co.uk

Penta Services: websites, apps, SEO and GEO, hosting. 15+ years across 50+ business sectors. Offices in London, Italy and Pakistan.

One website. Clear fees, real people and an easy first meeting.