

## AI READINESS BENCHMARK 2026:

# HOW TOP FINANCIAL SERVICES COMPANIES PERFORM IN GENERATIVE SEARCH

A data-backed analysis of how leading financial institutions are structured for AI discovery.

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[www.trustworthydigital.com](http://www.trustworthydigital.com)





## About the Study

We analyzed 15 top U.S. financial advisory firms from [Newsweek's 2025 rankings](#). We used our [AI Readiness Tool](#) to see how prepared they are for AI-powered search.

## Executive Summary

Client research for financial advice has changed dramatically. People now get AI-generated answers before clicking a link. These AI summaries pull information from many sources. They form client opinions before anyone visits a website. This creates a huge visibility problem. Many firms haven't caught on yet.

If your content isn't easily understood and cited by AI, your brand might vanish. You'll miss critical early-stage client interactions.

## The Study

Trustworthy Digital used our AI Readiness Tool to examine 15 leading U.S. financial advisory firms. These companies are among the highest-revenue in the industry.

## What We Found

Most financial advisory firm websites can be read by AI. But very few are structured well enough for AI to easily cite their information. This is a big problem.

Industry average  
AI Readiness score

62/100

→ **Leaders (65+)**

5 firms

→ **Middle Tier (58-64)**

7 firms

→ **Needs Improvement (<58)**

3 firms

The gap between top performers and those struggling is growing fast.

- Five firms scored 65 or higher.
- Seven were in the 58-64 range.
- Three firms scored below 58, showing real weaknesses in AI visibility.

## Most Common Gaps Across Financial Advisory Firms' Websites



Content is made for people, not for machines or AI to easily understand.



Pages often lack clear answers to client questions like "What are your fees?" or "How do you handle market volatility?"

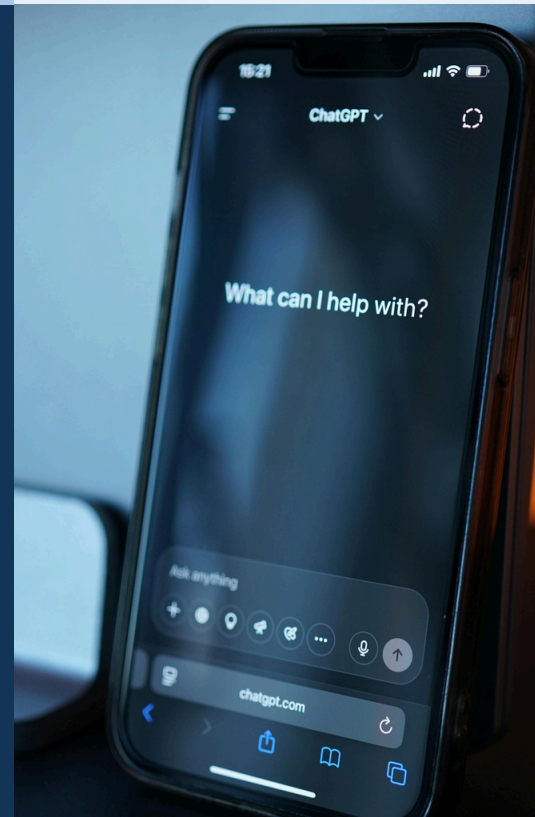


Key authority signals, thought leadership, credentials, process explanations, are frequently missing or hard to find.

# The Biggest Missed Opportunity: Gen AI & Financial Services

Many financial advisory firms already have good content. The real issue is how that information is structured and connected. Small, smart changes can significantly boost your brand's AI visibility. You'll get referenced more often during client research.

**AI-powered search is quickly becoming how clients find financial advice. Firms need to adapt now, not later.**



# AI Search: Reshaping Client Research in Financial Services

Clients start researching long before they ever call you. They're asking questions like, "What is a robo-advisor?", "How do I plan for retirement?", or "Who are the best financial advisors for entrepreneurs?"

Before, these questions sent them to websites, comparing firms in many tabs. Now, AI-generated answers are common. AI pulls information together, giving clients a single, quick response.

## The New Client Journey

Clients no longer click through websites. They get AI summaries that mention, or skip, certain brands. This depends on how easily AI can find and understand your content.

### Here's what that looks like:

A client searches "[best financial advisors for retirement planning](#)." An AI-powered search engine generates a response mentioning three or four firms by name. If your brand is not referenced, you are not part of the consideration set. The client moves forward without knowing you exist.

## Why Some Firms Get Referenced, Others Don't

AI looks for content that is clear, structured, and authoritative. It likes organized headings, direct answers, credentials, and local details.

Vague content, too many images, or text AI can't easily read gets ignored. Your firm might be missed.

## The Visibility Shift

Visibility isn't just about first-page rankings anymore. It's about being in the AI's answer itself. If AI can't easily grab facts from your site, it routes around you.



Clients still get answers, but from your competitors. This compounds over time, giving AI-ready firms a big advantage. Others become invisible when client decisions are made.

# How We Scored AI Readiness

This report assesses the AI readiness of 15 leading financial advisory firms. They were chosen from the Newsweek's America's Top Financial Advisory Firms 2025 rankings. We used the Trustworthy Digital AI Readiness Tool for our assessment.

## Our Scoring Framework

Each firm received an overall AI Readiness Score, from 0 to 100. This score reflects how easily AI can understand, trust, and reference a brand's content. Our framework uses four core pillars to determine this:



**Extractability** measures how easily AI systems can find facts, answers, and structured information. High extractability means clear headings, scannable blocks, and direct answers. Vague language or image-only sections lower this score.



**Structure** evaluates how machine-readable the content is. This includes heading hierarchy and overall organization. Well-structured pages help AI understand relationships between topics, locations, and services on your site.



**Authoritativeness** assesses content credibility and supporting evidence. AI prefers pages with proof points, like certifications, industry affiliations, and clear explanations. This also includes explicit details about who, where, and what.

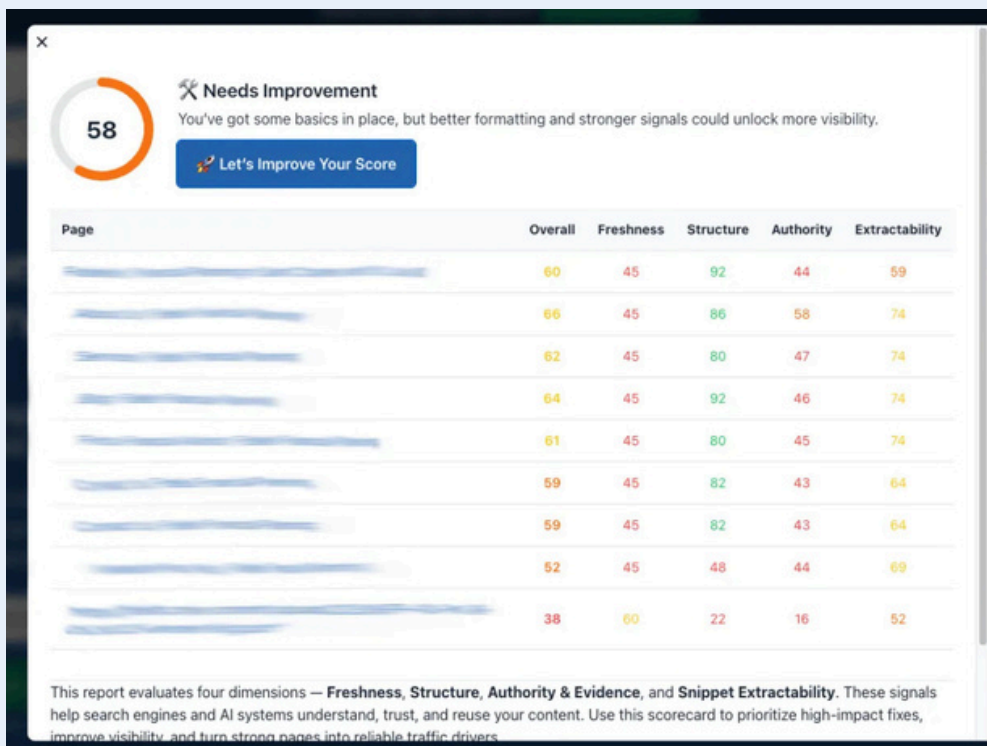


**Freshness** reflects how current your content is. AI systems favor recently published or updated content, as it signals reliability. Outdated information reduces trust and can lead to being left out of AI summaries.

## How Our AI Readiness Tool Works

Our AI Readiness Tool evaluates important pages across each firm's website. We focus on key content areas like advisor bios, service descriptions, thought leadership, and FAQ sections.

We then combine page-level findings to reflect a brand's overall readiness, not just isolated page performance. We concentrate on overall readiness and industry patterns. We only reference individual pillars when they explain performance differences.



## What AI Readiness Measures

At its core, AI Readiness is about clarity. Can an AI system quickly understand what your firm offers? Whom do you serve? Why should a prospect choose you? Can it extract that information clearly enough to cite it?

The financial advisory firms that score highest don't necessarily have the most content. They are the ones whose content is organized, backed by evidence, and structured for machine comprehension.

*Scores reflect observed patterns at time of analysis and do not represent endorsements or guarantees.*

# Industry Snapshot: Financial Services AI Readiness in 2026

We looked at 15 big financial advisory firms. Their websites all look good and work well, but their AI Readiness scores vary a lot. It's a significant gap.

## Overall Industry Performance

The average AI Readiness score for these 15 firms is 62 out of 100. This means AI systems can read their content, but often can't confidently use it. They have "inconsistent visibility."

## 28-point gap

Between the highest and lowest scorer (79 vs. 51).

## Score Distribution

### Leaders (65+):

5 firms have strong extractability, clear structure, and credible authority.

### Middle tier (58-64):

7 firms show basic readiness but have clear weaknesses.

### Needs improvement (below 58):

3 firms have big structural issues that hide them from AI.

The 28-point difference, though seemingly small, has a big impact. Top firms often appear in AI summaries. Those with low scores are typically left out, even in their own markets. This is a crucial distinction.

Firm	Score
<a href="#">Falcon Wealth Planning</a>	79
<a href="#">GeoWealth Management</a>	76
<a href="#">Winthrop Partners</a>	75
<a href="#">Legacy Financial Strategies</a>	69
<a href="#">Sage Mountain Advisors</a>	68
<a href="#">Sarofim</a>	67
<a href="#">Econologics Financial Advisors</a>	65
<a href="#">Clearbrook Investment</a>	62
<a href="#">Nest Egg</a>	60
<a href="#">Rose Capital Advisors</a>	57
<a href="#">Howard Financial Services</a>	56
<a href="#">True Wealth Advisory Group</a>	54
<a href="#">Independent Wealth Network</a>	53
<a href="#">Cliffwater</a>	51
<a href="#">Newday Funds</a>	51

## Common Patterns Across the Industry



### Freshness Challenge

Most firms (11 of 15) scored low on freshness. Their core content isn't updated often. AI sees this as unreliable, which is a problem.



### Structure Strength

Most firms have good basic site structure. But without strong authority and easy extractability, even well-organized content underperforms for AI.



### Authority Gap

Only three firms scored above 50 in authority. Most sites lack the clear proof points AI needs to cite content. This is the biggest missed chance for firms.



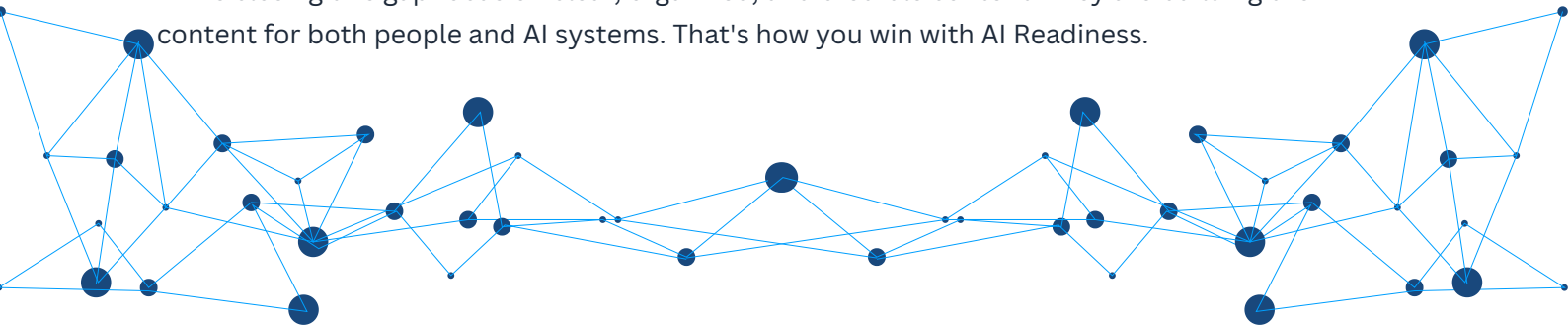
### Varied Extractability

Some firms make content easy for AI to scan for answers. Others use too many images or narrative text. This makes it hard for AI systems to parse information.

## What These Patterns Reveal

Most financial services websites are easy for AI to read, but hard for AI to cite confidently. The content is there, but it's not set up to build trust or give clear, extractable answers. This is a mismatch between how content is made and how AI uses it.

Firms closing this gap focus on clear, organized, and credible content. They are building their content for both people and AI systems. That's how you win with AI Readiness.



# Top Performers: What AI-Ready Financial Services Do Differently

The top-scoring financial firms follow clear patterns. They aren't always the biggest names. What makes them stand out is how they organize content. They make it easy for both people and AI to understand, building trust with intelligent systems.

## Falcon Wealth Planning

Overall Score: 79

The screenshot shows the Falcon Wealth Planning website. At the top, there is a dark navigation bar with the phone number (855) 963-2526 on the left, social media icons (LinkedIn, Facebook, YouTube, X) on the right, and the Falcon Wealth logo with the tagline 'PLANNING MADE SIMPLE' and 'Award Winning Registered Investment Advisor\*' in the center. Below the navigation bar, the main content area features a large hero section with the headline 'We Help You Live the Life You Want' and the sub-headline 'Keep More. Worry Less.' Below the headline is a video player showing a man in a suit, with the title 'A FOUNDER'S STORY' and a red play button. Under the video player are three statistics: '300+ Google Reviews', '100,000+ People Helped', and '\$1.4B+ Assets Managed'. To the right of the video player is a contact form with fields for 'First Name\*', 'Last Name\*', 'Email\*', 'Phone Number\*' (with a country code dropdown set to '+381'), and 'Postal Code\*'. A 'Next' button is located at the bottom right of the form.

Falcon Wealth Planning earned the highest AI Readiness score. They perform strongly in all key areas.

### Key Strengths:

- Freshness: 79 - They regularly update their content, showing it's always relevant.
- Structure: 81 - Their service pages are clear, and FAQs are well-organized.
- Authority: 90 - They clearly highlight their strong credentials and expertise.

## GeoWealth Management

Overall Score: 76

GeoWealth Management excels with well-structured content. Their information is clear and easy to pull out.

### Key Strengths:

- Structure: 92 - Content focuses on their platform and clear service descriptions.
- Extractability: 85 - Information is highly specific, with consistent links between topics.



## Winthrop Partners

Overall Score: 75

Winthrop Partners consistently keeps their content fresh. Their site structure makes it easy for machines to understand.

### Key Strengths:

- Freshness: 80 - They publish regular expert articles, keeping their site current.
- Structure: 92 - Service-specific pages are neatly organized and easy to navigate.
- They are clear about fees and show strong adherence to rules.



### What These Top Performers Have in Common

- Transparency & Clarity - Clear articulation of services, pricing, and team expertise
- Educational Content - Well-structured articles, guides, and FAQs for client understanding
- Authority Signals - Detailed team bios, credentials, and thought leadership content
- Consistent Freshness - Regularly updated content like blogs and market insights
- Structured for Machines - Content architecture designed for easy AI parsing and citation

## The Takeaway

For financial services firms, high AI Readiness means demonstrating expertise, transparency, and a commitment to current information, all structured in a machine-readable format.

# Underperformers & Missed Opportunities

The lowest-scoring firms aren't failing due to bad design. Their websites often look great. The real problem is structural: content isn't set up for AI to understand.

This makes it tough for intelligent systems to find, use, or cite their information.

## Key Barriers to Visibility

### Content built for visuals, not answers:

Big images and video backgrounds are nice. But if there's not enough clear text, AI has nothing to work with. Pages full of image overlays just don't perform well.

### No direct answers to buyer questions:

Your clients have questions like "What are your fees?" or "How are you different?" If the answers are hidden in long paragraphs, AI can't find them.

### Minimal internal linking:

If pages act like isolated islands, AI struggles to connect the dots. This makes it hard for AI to grasp the full scope of what your firm offers.

### Generic or vague headings:

Titles like "Our Approach" or "Why Choose Us" aren't helpful for AI. It needs specifics. Think "Fee-Only Wealth Management for High-Net-Worth Families."

### Weak authority signals:

Missing certifications, unclear affiliations, or incomplete company info hurts. AI needs strong signals to trust and cite your brand.

### Outdated or inconsistent information:

Old content, broken links, or conflicting data sends a bad signal. AI sees this as a lack of reliability.

## Why This Matters

When AI finds content difficult to use, it simply moves on to the next source. Even if your firm is strong, it might be overlooked. Your message won't get through if AI can't process it.

## What Your Competitors Are Gaining

Firms fixing these issues show up more in AI-powered search. They're referenced by name with clear service summaries. This creates a powerful cycle: more citations mean more authority over time.

## The Opportunity

These issues are fixable. Most firms already have a strong content foundation. The challenge lies in restructuring what exists, adding clear headings, breaking narrative text into scannable sections, creating FAQ pages, and strengthening authority signals. These are strategic, targeted improvements, not wholesale redesigns.

## What AI Readiness Means for Your Firm

Forget marketing buzzwords. Being AI-ready is about getting found. It decides if your firm even makes the list when potential clients first start looking for services.

### Why This Is Urgent

AI-powered search is changing how clients find you, right now. More people use AI for initial research daily. If your content isn't built for AI, you're invisible. Not because your services are bad, but because AI can't process your information.



## The Long-Term Problem

Clients won't consider brands they never see. If your firm doesn't appear in early AI searches, you're out. By the time they reach out directly, their choices are often already made.

## The Growing Divide

AI learns what to trust. Brands cited often gain authority and get referenced more. Those consistently overlooked become less visible. Early adopters of AI readiness get a real competitive edge.



## Why Delaying Is Risky

AI readiness isn't a one-time project. It's an ongoing process. As AI changes, your content must adapt. Firms treating this as a quick fix will fall behind fast.

The real danger is invisibility, not just less traffic. Traditional SEO won't show this impact. The risk is being completely missed during crucial research phases. The gap isn't huge yet. Firms focusing on clear, structured content can catch up quickly.

This isn't just about marketing. It hits client acquisition directly. If clients form opinions using AI search, being absent means fewer qualified leads ever reach your sales team.

## The Leadership Question

Is your firm ready to be discovered, understood, and cited by the AI systems that influence client decisions today?

# Your AI Readiness Score: What it Means

This benchmark helps you diagnose your firm's AI readiness. It shows you where the industry stands and reveals patterns that set successful firms apart from the rest. Use it to understand your current position.

## Understanding Your Score

### Score (65+):

You're ahead of the curve. Your content is well-structured for AI. Now, focus on boosting authority and keeping content fresh.

### Score (58-64):

You have a good start, but execution is inconsistent. Standardize your content architecture, especially for high-value pages.

### Score (below 58):

You have significant structural issues. Your content might look great, but AI struggles to understand it. Prioritize making your information easy for AI systems to extract.

## What Leaders Should Do Next

### Step 1: Assess current state

Where are your content gaps? Which pages perform well? Where do you lack authority signals or fresh information?

### Step 2: Focus on high-value pages

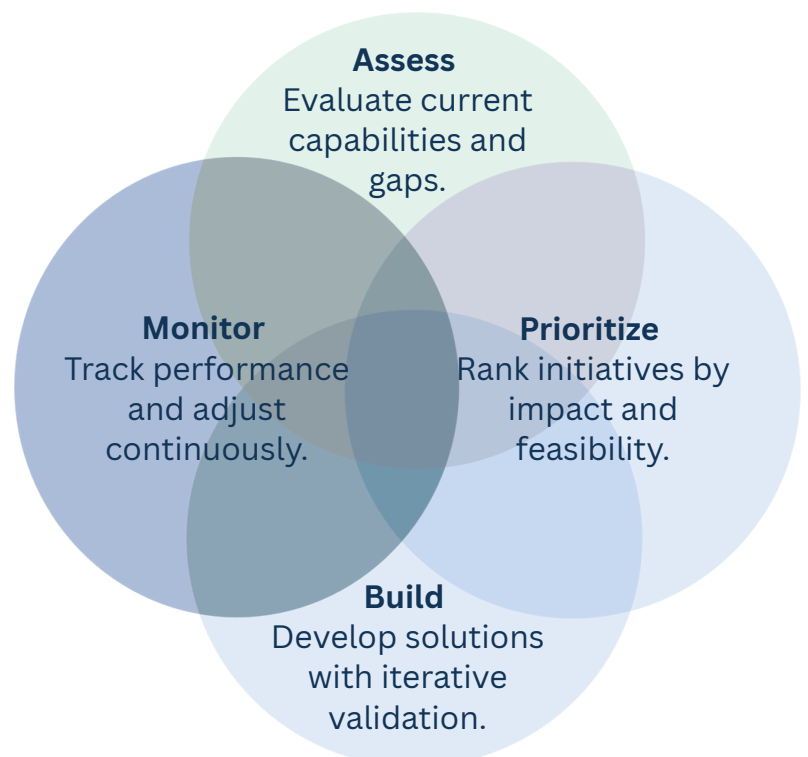
Your service descriptions, team bios, credentials, fee pages, and educational content are prime candidates for AI referencing.

### Step 3: Build for clarity, not volume

The goal isn't more content. It's organizing your existing content so AI systems can easily understand and cite it.

### Step 4: Monitor and iterate

-AI readiness isn't a one-time fix. Regular checks and small, consistent improvements will give you big results over time.



# Why a Structured Plan Matters

## Reactive Approach:

- Scattered improvements
- Difficult to measure
- Limited results

## Strategic Approach:

- Targeted changes
- Measurable outcomes
- Sustained improvement

Firms that react to AI readiness see minimal gains. Those that plan strategically, assessing, prioritizing, and iterating, achieve faster, lasting improvements. This ensures you stay visible where it counts.



**AI-powered search already influences client decisions.**

**The real question is:  
Is your brand set up to be part of  
the conversation?**

# Trustworthy Digital: Our AI Readiness Story

We partner with businesses where visibility drives growth. Our goal is to help brands adapt. Buyers now use AI-powered search, and we ensure your content reaches them. It's about being seen where it truly counts.

## Why We Created Our AI Readiness Tool

AI-generated answers are changing how people find information. Many brands optimized for old search methods. Their content isn't ready for AI citation. This creates a growing visibility gap. We saw this problem and built a solution.

Our AI Readiness Tool brings clarity. It shows how well your content is structured for AI discovery. It identifies specific gaps and helps prioritize improvements. This gives leadership teams solid information for smart decisions.

## Who We Work With

We partner with companies across various industries. This includes home building, financial services, and professional services. These are businesses where buyer research starts early. Strong visibility during this phase drives pipeline quality and long-term growth.

## What Makes Our Approach Different

We see AI Readiness as a content architecture challenge. It's not just a technical fix. The best performing businesses don't have complex tech. They have clear, structured content. This builds confidence with both AI systems and human buyers.

## How Financial Institutions Can Assess Their Own Readiness

Our AI Readiness Tool evaluates content across four pillars. These are extractability, structure, authority, and freshness. It delivers a clear, data-backed assessment. You'll know exactly where you stand and what to prioritize next.

If you're unsure how AI search affects your business, our AI Readiness Tool quantifies gaps and prioritizes your next steps for a clear path forward.

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