

EWA (Equilibrium Wealth Advisors) Industry: Financial Advisors



Background: Since its founding in 2020, Equilibrium Wealth Advisors has been focused on providing clear and transparent client service, believing it is the firm's responsibility to be cost-efficient and to implement a fee structure that avoids the inherent conflicts of interest found in other payment methods.



Challenge: Though its website and general online presence did a great job of clearly articulating the firm's philosophy and approach, EWA wanted to be even more transparent about the level of service delivered to each client. When the SEC finalized the unified Marketing Rule in 2022, EWA recognized the opportunity to share client testimonials as a cornerstone of its marketing efforts.



Solution: When EWA leadership encountered Amplify Reviews, they saw Amplify's approach as a "no brainer" avenue for showcasing the quality of service that EWA delivers to their clients. By encouraging clients to leave reviews on both Google and directly through the Amplify Reviews platform, EWA ensured that clients had options for how to share their experience in a channel that felt comfortable.



Results: Within 60 days of starting its online reviews efforts, EWA generated over **100 positive client reviews**. Even more impressive, at the time of print, EWA boasts a perfect **5.0-star rating**.



Benefits: EWA benefits in several ways from its outstanding online reputation:

- **Social Proof** - EWA uses Amplify Reviews' technology to proudly display a feed of all of its client reviews on its own website. To many consumers, all wealth advisor websites can look very similar, but the genuine experiences of other clients highlight all the reasons why a prospect can expect to be satisfied when they choose to work with EWA.
- **SEO** - Google loves reviews, and so do consumers. When a consumer searches for EWA, they see EWA's 5-star rating prominently displayed at the top of Google's search results page. A constant stream of reviews delivers recent, relevant, and unique online content for EWA, which in turn means continued strong performance with search engines like Google.
- **Confidence around Compliance** - The Amplify Reviews platform was designed with regulatory compliance in mind. All reviews are verified to have come from actual clients. If a review contains personally identifiable information, or content which is prohibited by regulators, that comment can be archived in the Amplify Reviews system with all appropriate documentation and record keeping.
- **Anonymous Options** - EWA initially drove clients to Google to leave their reviews, and this effort got an excellent response. However, Google requires reviewers to leave their name on every review. So on the second "ask," EWA also gave their clients a way to leave reviews anonymously through the Amplify Reviews platform. This anonymous option yielded 56 percent more reviews than when Google was the only option offered. Reviewers are still verified to be actual clients, but their names are not published alongside their reviews.

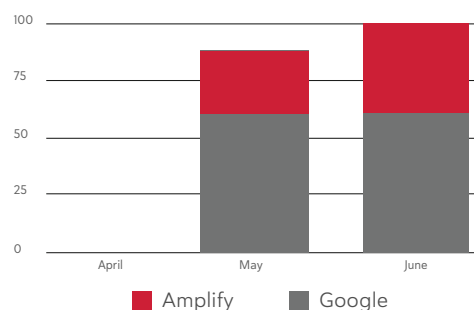


EWA now has more 5-star reviews than any comparable firm in the Pittsburgh area. Amplify's system provides flexibility to easily capture verified reviews from all of our clients in a compliant fashion. We're demonstrating the transparency we preach on a whole new level!"

-Stephanie Bogden, COO & CCO & Partner, Equilibrium Wealth Advisors

Amazing Results:

Total Reviews



Conclusion:

EWA has earned a first class reputation thanks to the amazing service and results this team delivers for its clients, and Amplify Reviews enabled the whole world to see just how happy EWA's clients are, ensuring that this virtuous cycle continues.

*Last updated July, 2023.