

# Struggling to Be Seen on AI Search?

## An Introduction to AI Search for Wealth Managers and RIAs



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# Why Should I Invest the Time to Read This?

The marketing model wealth managers have relied on is **breaking down**. Organic search traffic — the lifeblood of inbound leads for years — is drying up. Lead generation pipelines are thinning. And AI search engines are rewriting the rules of discovery.

## The numbers tell the story:

- **Google is sending less traffic.** Referrals are falling while AI platforms like ChatGPT, Perplexity, Claude, and Gemini are on the rise.
- **AI referrals are surging.** In the last year alone, visits from AI platforms to the top 1,000 sites jumped **357% year over year**. In June 2025, AI engines delivered more than **1.1 billion referrals**, compared to Google's 191 billion — but the growth curve is steep.
- **SEO rankings rarely overlap with AI search answers.** On most AI platforms, the cited sources only rarely match Google search results, which means we need a different strategy for appearing in AI search.
- Prospects are turning to AI. More than 60% of U.S. adults say they now use AI tools to search for information, and **half of all ChatGPT messages** are about “seeking information or clarification to inform a decision.” When your clients ask AI who is the best wealth manager in Boston, Dallas, or Denver, your firm may be invisible.
- **AI traffic is gold, not garbage.** Leads from AI search are exponentially more valuable. Visitors referred by AI platforms are **4.4x more valuable** than those from traditional organic search.

The implications are urgent. Without a shift to Generative Engine Optimization (GEO), RIAs and wealth managers risk being cut out of the discovery process altogether. The old playbook of keywords and SEO won't save you. AI search rewards different signals, different formats, and different sources.

This paper explains what's happening, why it matters, and how wealth managers and RIAs can claim visibility in the AI era. The clock is ticking. The firms that adapt will be found. The rest risk vanishing from the conversation.

# 357%

of visits from AI platforms to the top 1,000 sites jumped year over year

# Why Your Firm Disappeared from Results



## The shock.

**A year ago, your SEO worked.**

You ranked for “*wealth manager in Boston*” or “*RIA in Tampa*.”

Your site showed up. Today, you type that same query into ChatGPT or Perplexity—and your firm is invisible. Instead, you see big national or lesser brands.



## The cause.

**AI assistants don’t present links like Google.** They synthesize and generate answers. And in doing so, they rely on different sources: authoritative media, trusted directories, lists, and content that’s structured in AI-friendly formats. That means your carefully optimized SEO pages might not make the cut.

# SEO $\neq$ GEO



## Why your old playbook doesn't work.

For years, SEO was the ticket. Write keyword-heavy pages, build backlinks, climb the Google ranks. That game is over. AI search doesn't reward those tricks. It doesn't even look at the same signals. Which is why firms that still invest heavily in SEO alone are seeing diminishing returns.



## What's different now.

AI assistants answer with citations, summaries, and shortlists. They lean on earned media and structured, answer-first content — not keyword-stuffed blogs. Your beautiful Google rank might mean nothing if AI models aren't pulling from your site.



## The bottom line.

SEO may still work for some, but GEO is the new requirement. GEO asks: Which outlets, formats, and pages does AI actually cite in our category? How do we earn mentions there, and how do we structure our own content so AI can lift it? Until you make that shift, you'll remain invisible in the channels where prospects are now asking their most important questions.



# SEO vs. GEO

## SEO

## GEO

Core Goal	Rank higher in Google search results through keywords, backlinks, and technical optimization.	Be mentioned and cited by AI assistants (ChatGPT, Perplexity, Gemini, Claude, etc.) when users ask questions.
Primary Signals	<ul style="list-style-type: none"> <li>- Keyword density and placement</li> <li>- Backlinks and domain authority</li> <li>- Page load speed and UX</li> </ul>	<ul style="list-style-type: none"> <li>- Mentions in earned media and authoritative sources</li> <li>- Structured, concise, “answer-first” content</li> <li>- Relevance to category-specific citations AI pulls from</li> </ul>
Content Style	Long-form blogs, keyword-rich pages, link-building content.	Short, precise, and well-structured answers that AIs can lift directly. Citations from trusted publications and data sources matter most.
Distribution Strategy	Build backlinks, publish optimized blogs, push traffic through SERPs.	Place content in outlets AI trusts (credible publications, databases, industry authorities). Structure your own site so AI can interpret and cite it.
User Interaction	Users click through SERPs, browse multiple sites, compare results.	AI delivers a synthesized answer (with citations), often bypassing traditional click-through.
Measurement of Success	Higher Google ranking, increased website traffic, organic CTR.	Presence in AI answers, being cited in summaries /shortlists, and visibility where prospects ask questions.
Current Effectiveness	Still useful for certain discovery paths, but declining ROI as zero-click searches increase.	Emerging requirement: determines whether you appear in a fast-growing, influential channel — AI assistants.
Strategic Question	“How do we rank higher on Google?”	“Which companies get mentioned and which outlets and formats does AI cite in our category? How do we earn mentions there?”

# The Complexities of AI Search Intelligences

AI search operates on probability. The same search by the same person on the same platform may yield different results and citations every time.

In addition, each platform — ChatGPT, Gemini, Perplexity, Grok, Claude, and Copilot — operates under different training data, crawling agreements, and citation habits.

Optimization is about raising the probability that AI platforms will mention and cite your firm, not locking in a permanent rank.

## 3.1 AI Search Relies on Authority and Trust

Trust is at the heart of how AI search engines decide what to surface, and the process looks a lot like how humans make everyday choices.

Take the example of shopping for a toy for a six-year-old. You type your query into Google. The first result is Amazon. It has endless options, but Amazon is a marketplace that profits from sales. The photos often make products look bigger or better than they are, and past purchases have left you disappointed.

The following result is Wirecutter from the New York Times. At first glance, it feels independent

and rigorous. But you also know the publication earns a commission from its recommended products. Useful, yes, but not entirely without bias.

Then you stumble across a parenting blogger. She's writing about a toy she bought and tested with her six-year-old child. She said she wasn't compensated. Her post feels authentic, rich with details, and echoes your parenting experiences.

As a shopper, you weigh all of these sources: Amazon has scale, Wirecutter has authority, and the blogger feels relatable and trustworthy.

AI search works similarly. When it receives a prompt, it reviews countless sources. Some are met with skepticism, others are ranked as authoritative, and others are considered as neutral. The end result reflects that invisible ranking of trust.

That's why authority and thought leadership matter greatly in GEO. When a wealth manager or RIA publishes well-researched, credible content that answers the questions prospects are asking, they increase the odds that AI will cite them.





In essence, the machine does what people do: scan, judge, and choose which voices it finds most trustworthy. And credibility and believability increase when your firm appears in the media (a trust and authority signal that machines prize). The old adage, "It has to be true if it was in the newspaper," holds true, even in our skeptical times.

## 3.2 Media partnerships raise the influence of some publications

Several top publishers have formal content licensing deals with AI companies. These deals allow AI platforms to directly use those publishers' articles when answering questions, which effectively gives those sources an even greater presence in AI-generated content.

Other publishers actively block AI platforms from reading their content, like the New York Times does with OpenAI, which makes its articles effectively invisible on the platform. Landing an article in the New York Times is still a win, though, and there are ways to amplify those signals to AI platforms even when an article is blocked.

## HERE ARE A FEW NOTEWORTHY PARTNERSHIPS:

PUBLISHER	AI PARTNER(S)	MEDIA BRANDS/PROPERTIES
CONDÉ NAST	<i>OpenAI, Amazon</i>	Wired, The New Yorker, Vogue, GQ, Vanity Fair, Bon Appétit, Epicurious, Glamour, Allure, Architectural Digest, Ars Technica, Teen Vogue, Self, Condé Nast Traveler
HEARST	<i>OpenAI, Amazon</i>	Good Housekeeping, Cosmopolitan, Harper's Bazaar, Esquire, Men's Health, Women's Health, Seventeen, Elle, Popular Mechanics, Car and Driver, Town & Country, Delish
 The New York Times Company	<i>Amazon</i>	The New York Times, The Athletic, NYT Cooking, Wirecutter
People Inc. <small>(formerly Dotdash Meredith)</small>	<i>OpenAI</i>	People, Allrecipes, Martha Stewart Living, Better Homes & Gardens, Real Simple, Food & Wine, InStyle, Verywell, Investopedia, Shape, The Spruce, Byrdie, Health
axel springer	<i>OpenAI</i>	Politico, Business Insider, Bild, Die Welt, Fakt, Upday, Rolling Stone (Germany)
 REUTERS	<i>Meta</i>	Reuters News (global wire service)
News Corp	<i>OpenAI</i>	The Wall Street Journal, MarketWatch, Barron's, The Times (UK), The Sun, The Australian, New York Post, The Daily Telegraph (AU), Herald Sun
The Washington Post	<i>OpenAI</i>	The Washington Post, The Lily, Voraciously, By The Way, Launcher
GANNETT	<i>Perplexity</i>	USA Today, USA Today Network
Various	<i>Perplexity</i>	Time, Fortune, Entrepreneur, Los Angeles Times, ADWEEK, The Independent, Gear Patrol



### 3.3 Prompts control the playing field

Short of asking customers about the prompt that led them to you, we can never know exactly what questions or requests users enter into AI search engines, and the AI platforms are not about to tell us.

However, we can use third-party data from actual users who have opted to share their prompts, coupled with years of experience in the industry,

customer conversations, and AI intelligence to formulate prompts that an RIA or wealth management firm should be optimizing on.

They fall into **three** categories. **Broad prompts**, **long-tail prompts**, and **ultra-niche prompts**.

#### REAL-WORLD EXAMPLES:



##### Broad prompt

*“Best wealth management firms in the country.”* AI pulls Barron’s, Forbes, CNBC, SmartAsset, Newsweek, and [unbiased.com](#). It also checks Reddit but dismisses the thread, since it simply repeats Forbes rankings. The result? National giants show up such as Morgan Stanley, Merrill, UBS, Goldman Sachs, Fidelity, Vanguard.



##### Long-tail prompt

*“Best wealth management firms in the Pacific Northwest.”* AI scans national sources but adds local media and boutique firms. The machine literally reviews some 20 different sources, many of which it dismisses for not being relevant or authoritative. However, a single article that appears in a small local newspaper seems to impact the results because it identifies “Top Financial Advisors in the Pacific Northwest.



##### Long-tail prompt

*“Best financial advisors in Seattle.”* Now it digs into local firm websites, regional publications, and directories. Some advisory firm pages (like [wealthkeel.com](#)) get included in citations but might not influence the answer unless they contain prompt-matching content.



##### Ultra-Niche prompt

*“Best Seattle wealth managers for ISO stock option planning.”* AI recalibrates. It favors pages that connect Seattle, high-tech clients, and ISO expertise. Sources shift accordingly, much as a human would home in on specialized advice. But because there is no media coverage or owned content that addresses this very point, the machines surface firms that have authority in serving businesses in Seattle.

So as you can see, AI search is not nearly as easy to tame as traditional SEO. An array of platforms, the inherent inconsistencies of AI, vagaries of authority, and the variance in prompting all cloud the issue.

What’s needed is a vastly different approach. One where data, combined with human intelligence in financial services, can tease out answers and deploy data-intensive campaigns where results can be monitored and optimized over time.

### 3.4 The GEO Equation

At its core, GEO is **not** one system — it's the sum of dozens of variables playing out across multiple AI platforms. Unlike SEO, which is largely driven by Google's ranking formula, GEO requires accounting for:

$$\text{GEO Visibility} = f\left(\sum_{i=1}^7 \left[ P_i \times (A_i + T_i + F_i + D_i + U_i + R_i) \right] + \varepsilon \right)$$

#### WHERE:

 **$i$  = Each AI platform**

(ChatGPT, Gemini, Claude, Perplexity, Copilot, Google AI Overviews, LLaMA-based tools, etc.)

 **$P_i$  = Platform weight**

(each model emphasizes sources differently — ChatGPT leans on Wikipedia, Perplexity on Reddit/UGC, Google on YouTube/Quora, etc.)

 **$A_i$  = Algorithmic authority**

(media deals, publisher reputation)

 **$T_i$  = Trust signals**

(citations, facts and data, transparency of sourcing)

 **$F_i$  = Freshness factor**

(newness of the content — AI prefers newer material than traditional Google SERPs)

 **$D_i$  = Domain/context fit**

(how closely the content matches the prompt intent and subject category)

 **$U_i$  = User-generated influence**

(Reddit threads, YouTube comments, Quora answers — varies widely by platform and topic)

 **$R_i$  = Reasoning variability**

(the same prompt may surface different results run to run because AI models apply probabilistic reasoning)

 **$\varepsilon$  = Inherent inconsistency**

(noise, hallucinations, unexplainable shifts in output) probabilistic reasoning)

That's a lot to absorb, and more than most enterprises can manage independently. The solution? Read on →

# 4 Introducing:

A large, stylized black letter 'G' followed by a period, enclosed within a white rounded rectangle.

INFLUENCE  
ENGINE

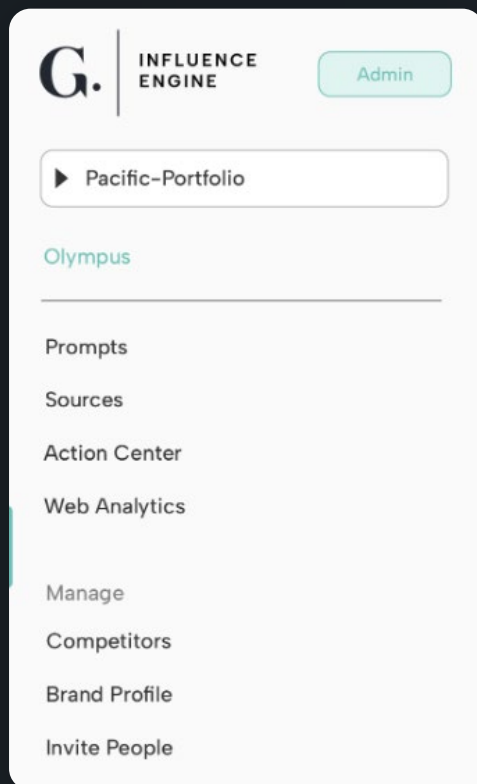
## What it does

The Gregory Influence Engine continuously monitors how often your firm is mentioned on up to eight major AI platforms, including ChatGPT, Perplexity, Google's AI Overviews and AI Mode, Gemini, Claude, Copilot, and Grok. Every day, it tracks category-specific prompts to see how often your firm is recommended, how often your competitors are mentioned, and which sources, outlets, and individual pages are shaping the answers.

## We then translates those findings into clear guidance:

- Which publications and directories AI trusts in your category
- Which competitor pages are being cited
- Which of your own pages map — or fail to map — to the questions prospects are asking





### How it works

1. Prompt Mapping — Identify up to 100 prompts across seven AI platforms that matter most to prospects.
2. Daily Monitoring — Track which sources and exact pages AI engines are citing, and how those results shift over time.
3. Expert Analysis — In-house analysts with decades of financial services experience interpret the data, separating signal from noise.
4. Actionable Campaigns — Findings inform off-page and on-page strategies to dramatically increase the probability of being cited in AI answers.
5. Ongoing optimization — Gregory FCA account teams continually use results to optimize the campaign and provide a new set of KPIs to track campaign success.

### Why it matters

- AI search is now mainstream: 60% of U.S. adults use AI to find information.
- Financial services is one of the categories showing the highest lift from AI referral traffic — 4.4x more valuable than Google organic referrals.
- Old SEO tactics no longer map to AI: overlap between Google's top results and AI citations can be as low as 6%.

### The takeaway

Search is no longer “ten blue links.” AI answers are built from a finite set of trusted sources. The Gregory Influence Engine shows you exactly which sources those are and gives you the roadmap to earn a place in them.

# Why Gregory FCA

As one of the **nation's largest** strategic communications firms focused on financial services, Gregory FCA brings a unique blend of deep industry knowledge and cutting-edge AI expertise.



- **35+ Years of Financial Services Experience**

For more than three decades, we have served hundreds of financial institutions, including banks, RIAs, asset managers, credit unions, insurers, and fintechs. We understand the products, the regulations, the distribution models, and the ecosystem that define the sector.

- **The Most AI-Enabled PR Firm in the Country**

For more than three decades, we have served hundreds of financial institutions, including banks, RIAs, asset managers, credit unions, insurers, and fintechs. We understand the products, the regulations, the distribution models, and the ecosystem that define the sector.

- **Recognized Leadership in AI + Communications**

Our professionals regularly speak and write about the intersection of AI and human communications. We have been recognized as pioneers in the space, earning the PRSA Silver Anvil Award — the industry's highest honor — for our work in AI enablement.

- **Unmatched Dual Competency**

No other firm combines such depth of financial services expertise with such advanced AI capabilities. We apply both to design and optimize GEO campaigns that perform measurably better.

- **Innovation in Practice: The Gregory Influence Engine**

With the launch of the Gregory Influence Engine, we've introduced an entirely new way for financial brands to monitor, measure, and improve their visibility in AI-driven search. For the first time, clients can connect AI-driven exposure to tangible KPIs.

**The result:** Gregory FCA delivers communications programs that are smarter, faster, and better aligned with how discovery really happens today.