

From SEO to AEO: How AI is Reshaping Marketing

Led by Kat Margiotta, Rosemary Denney and Liz Fritz

The June 2026 Practice Management Clinic focused on the Sales and Marketing pillar. The session examined how artificial intelligence is transforming the way wealth management firms are discovered, evaluated and selected by prospective clients.

Moderated by Kat Margiotta, VP Brand and Business Development at BBR Partners, the session featured Rosemary Denney, Founder and CEO of Wealth Matters Consulting and Liz Fritz, Co-Founder of F2 Strategy. Together, the panel explored the shift from traditional search engine optimization (SEO) toward answer engine optimization (AEO), a rapidly emerging reality in which prospective clients increasingly rely on AI platforms such as ChatGPT, Claude, and other large language models to identify and evaluate advisors, firms and service providers.

AI is already shaping firm reputations, whether firms actively engage with the technology or not. Rather than simply ranking websites based on keywords, AI systems synthesize information from multiple sources—including websites, LinkedIn profiles, media mentions, podcasts, thought leadership content, professional directories, and client reviews—to form conclusions about a firm's expertise, credibility, and relevance.

Throughout the session, participants examined both the external and internal dimensions of this shift. While visibility increasingly depends on a firm's digital footprint and content strategy, panelists stressed that successful AI adoption begins with foundational work inside the

organization. Governance, data quality, compliance oversight, content management, and consistent brand positioning were all identified as critical building blocks.

A recurring theme throughout the discussion was that AI should be viewed as an amplifier rather than a replacement. Firms that have already invested in clear messaging, thought leadership, strong digital presence, and operational discipline are often seeing those efforts rewarded as AI platforms become a growing source of referrals and prospect engagement.

The Shift from SEO to AEO

The session opened with an examination of the transition from traditional search engine optimization to answer engine optimization.

Historically, SEO focused on improving rankings within search engine results through keywords, website structure and content optimization. While those factors remain important, AI-driven search introduces a more sophisticated model. Rather than simply identifying pages that contain specific keywords, AI systems evaluate information across multiple sources and synthesize those inputs to determine which firms appear most authoritative and credible.

The group noted that AI increasingly functions as a digital referral source. Prospects are no longer solely searching for firms through Google. Instead, they are asking AI platforms to generate recommendations, comparisons and detailed evaluations. Those systems then draw conclusions based on a firm's overall digital presence and perceived authority.

As a result, firms that consistently publish thought leadership, maintain active professional profiles, secure media coverage, participate in podcasts and demonstrate expertise across multiple channels are often more likely to be identified by AI platforms as credible and authoritative sources.

Key Takeaways

- AI-driven search is fundamentally changing how prospects discover wealth management firms.
- AEO builds upon traditional SEO but incorporates a much broader range of credibility signals.
- AI evaluates information across multiple sources rather than relying solely on website content.
- Firms with consistent digital visibility and strong thought leadership are often better positioned to benefit from AI-driven discovery.

Digital Credibility and AI Visibility

This part of the discussion focused on understanding the signals AI platforms use when evaluating firms.

Panelists explained that consistency has become increasingly important. AI systems look for alignment across websites, LinkedIn profiles, media mentions, podcasts, awards, rankings and other public sources. When firms consistently communicate their value proposition, expertise and areas of specialization across multiple channels, AI is more likely to recognize and reinforce those messages.

The conversation also highlighted the growing importance of individual professionals within firms. Employee profiles, personal LinkedIn activity, podcast appearances, authored content, and professional visibility all contribute to a firm's overall digital authority.

Several examples were shared of prospects arriving at introductory meetings with a surprisingly detailed understanding of a firm, often having consumed multiple pieces of content surfaced through AI-driven searches before initiating contact.

Participants also noted that audiences continue to engage deeply with substantive thought leadership when it addresses relevant challenges and questions. While shorter content may attract initial attention, many firms report strong engagement with podcasts, webinars, research papers, and other long-form formats when the content is targeted to the right audience.

Visibility is no longer solely a function of advertising spend. Increasingly, AI rewards expertise, consistency and authentic thought leadership.

Key Takeaways

- AI places significant weight on consistency across multiple digital channels.
- Professional visibility at both the firm and individual level contributes to overall credibility.
- Thought leadership, media appearances and educational content serve as important authority signals.
- Prospects increasingly arrive with substantial knowledge about firms before making initial contact.

Building the Internal Foundation

While much of the discussion focused on external visibility and discoverability, panelists emphasized that successful AI adoption begins with the internal foundations that support it.

Governance, compliance and security were identified as foundational requirements. Before firms experiment with AI-driven workflows or content creation, they must establish clear policies regarding data usage, client confidentiality, approved tools and organizational oversight.

The conversation also highlighted the importance of data architecture and operational discipline. AI systems can only be as effective as the information they are given. Inconsistent data, unclear ownership, fragmented systems and weak governance can undermine both operational efficiency and external marketing efforts.

The group discussed the need for strong content infrastructure. Firms were encouraged to develop clear messaging frameworks, define target audiences, establish content ownership and create repeatable processes for producing and distributing thought leadership, as well as involving other stakeholders such as marketing, brand and compliance teams in the review of externally facing content. As AI accelerates content creation and distribution, establishing clear approval processes and content standards is becoming increasingly important to maintaining consistency, managing risk and protecting firm reputation.

Several firms also shared examples of implementing AI training programs designed to help employees understand both the opportunities and risks associated with the technology while ensuring consistent adoption across the organization.

Key Takeaways

- Governance, compliance, and security should be addressed before broader AI adoption.
- Data quality and operational discipline remain essential prerequisites.
- Firms benefit from clearly defined content strategies and ownership structures.
- Employee education and AI training are becoming increasingly important.

Authenticity, Content Strategy and the Risk of AI Slop

Panelists and participants explored concerns surrounding AI-generated content and the growing prevalence of what many refer to as "AI slop."

While participants generally agreed that AI can significantly improve efficiency, there was also broad agreement that fully automated content creation often results in generic, impersonal and easily recognizable output.

Panelists encouraged firms to use AI as a productivity tool rather than a substitute for expertise and judgment. Common applications included summarizing podcasts, generating outlines, conducting research, organizing information and assisting with first drafts. However, authentic human review, editing, and refinement were viewed as essential.

Trust emerged as a recurring theme throughout the conversation. Both human audiences and AI systems appear to reward authentic, consistent and original content. Attempts to optimize solely for algorithms may ultimately undermine credibility.

The group also discussed AI hallucinations and the importance of fact-checking all AI-generated outputs. Participants emphasized that AI tools can confidently produce inaccurate information, making human oversight indispensable.

Key Takeaways

- AI can improve efficiency but should not replace human expertise and judgment.
- Authenticity is critical for both human audiences and AI visibility.
- Firms should use AI to support content creation, not automate it entirely.
- Human review and fact-checking are essential to prevent errors and hallucinations.

Optimizing Content for AI Discovery

The session concluded with a discussion of practical steps firms can take to improve discoverability.

Panelists encouraged firms to evaluate their websites and content through the lens of both users and AI systems. Website audits, content audits, and AI-generated assessments were suggested as useful starting points.

Several specific recommendations emerged, including reducing reliance on PDF-only content, ensuring key information appears directly on webpages, organizing content around common client questions, and improving the visibility of individual professionals' thought leadership.

Participants also discussed the value of repurposing content across multiple channels and encouraging employees to share firm content through their personal networks, both to increase human engagement and strengthen AI visibility signals.

Key Takeaways

- Firms should regularly evaluate how AI platforms describe and represent them.
- Website and content audits can identify opportunities to improve visibility.
- Publishing content directly on webpages is often more effective than relying solely on downloadable PDFs.
- Employee participation can significantly expand both reach and credibility.

Lessons Learned

The session reinforced that the wealth management industry is entering a new era of discoverability, one in which AI increasingly influences how firms are found, evaluated, and perceived. While the underlying principles of credibility, expertise and trust remain unchanged, the mechanisms through which prospects encounter firms are changing rapidly.

The discussion highlighted that firms do not need to abandon existing marketing strategies to succeed in this new era. Rather, organizations that have already invested in thought leadership, consistent messaging, professional visibility and strong digital foundations may find themselves particularly well positioned as AI becomes a more influential gatekeeper of information.

A recurring theme throughout the clinic was that successful AI adoption is ultimately less about technology and more about discipline. Firms must establish sound governance, maintain data quality, communicate consistently and create authentic content that reflects genuine expertise.

Finally, the clinic emphasized that while AI may increasingly shape visibility, efficiency, and discoverability, trust remains fundamentally human. As technology continues to transform marketing and business development, firms will continue to be judged by the quality of their expertise, the consistency of their client experience, and the credibility they establish over time. For firms serving ultra-high-net-worth families, those qualities remain among the most enduring competitive advantages.