FREE AEO AUDIT · SAMPLE · SEPTEMBER 2026

Sample Wealth Inc.'s AEO and SEO Performance

A sample free AEO audit from Paula Inc. Sample Wealth Inc. is not a real firm. We built it so you can see exactly what a free audit looks like before you ask for one. The Canadian search volumes in this document are real. Everything specific to Sample Wealth Inc. is illustrative.

1 · What this free audit covers

More and more, people looking for a wealth manager start by asking an AI assistant. They type a question the way they would say it out loud, and the assistant answers with a handful of firms. This audit looks at what happens to you in that moment.

We asked five questions your prospective clients might ask, and we asked them on the four assistants Canadians actually use: ChatGPT, Perplexity, Google's AI results, and Copilot. Then we read your own pages the way those systems read them, and we checked what your site does and does not make easy for them.

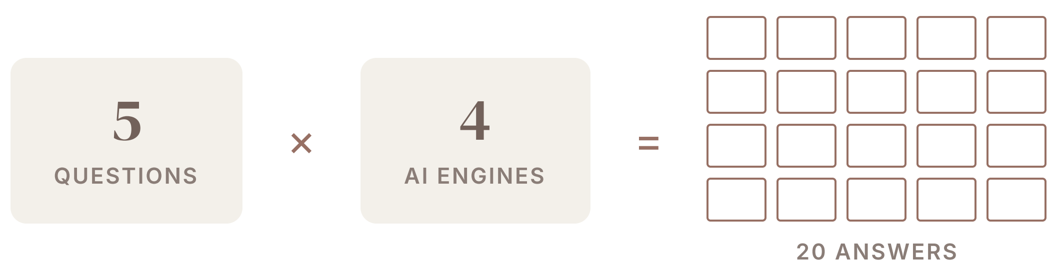
This is our free audit. It is a snapshot from a single day, and we have been careful throughout to say what one day can and cannot tell you. Where a question needs more time or more data than we spent, we say so rather than guessing.

---

2 · What we asked, and what came back

3 of 20

We asked five questions your prospects might ask, once each, on four engines. You were named in 3 of the 20 answers. One day cannot tell you whether that is your real position or noise.



(ChatGPT, Perplexity, Google AI, Copilot · one run · illustrative result.)

Before the questions themselves, one term we use throughout:

Search volume is the average number of times a phrase is typed into Google in Canada each month, measured over the past year. We use it as a proxy for how people phrase things. Someone who types "financial advisor" into Google tends to ask an AI assistant in similar words.

We did not invent hard questions to make a point. We built each one from phrasing that thousands of Canadians actually use every month:

THE QUESTION	WHY THIS QUESTION
How do I choose between a financial advisor at a big bank and an independent firm in Canada?	"How to choose a financial advisor" is the largest client search in the category: 8,100 searches a month in Canada, and the question sits exactly where an independent firm has to win
Best wealth management firms in Toronto for a family with $10 million or more	The shortlist question. The dollar figure stands in for "high net worth," which real clients rarely type
Financial advisors in Canada who handle estate planning and business succession, not just investments	"Financial advisor" out-searches "wealth manager" by a wide margin; estate planning draws 2,900 searches a month
My family has sold a business. Who should manage that kind of money in Canada?	A life event that starts real conversations, asked the way people speak to AI assistants rather than the way they type into Google
Which Canadian firms specialize in succession planning for families selling a business?	"Business succession planning" draws 880 searches a month

It is worth knowing that the assistants answered these questions readily. Thirteen of the twenty answers named at least one wealth firm. Thirty-four different firms came up across the run, a mix of bank-owned teams and independents. These were not questions the assistants declined or hedged. There was room in them for a firm like yours.

13 of 20 answers named at least one wealth firm.	**34** different firms came up across the run, bank-owned teams and independents.

3 · Why this happens, and where to start

When a firm appears this thinly, two explanations are usually in play, and a third applies specifically to independent firms.

The two common ones: other people are not talking about you in the places assistants draw from, and your own pages do not use the words people are searching with.

The third is particular to an independent competing against bank-owned brands. Assistants lean on how widely a name appears across the web, and the bank names appear everywhere, in contexts that have nothing to do with wealth management. That works against you. It is not the whole explanation, because independent firms do appear in these answers.

Here is what we can and cannot prove. We can show you all three. We cannot yet tell you how much each one is holding you back, because separating them takes measurement over weeks rather than a single day.

The language on your own pages is the one entirely within your control, and the one we can show you most concretely. This section is about that. The other two follow in the next section.

Here is the first thing a machine reads on your home page:

> *"Goals-based wealth architecture, built on three decades of disciplined capital stewardship for Canada's most discerning families"*

Read it as a stranger would. It does not say what kind of firm you are, where you are, or who you look after. Those are the things an assistant needs before it can offer you as an answer.

Before the evidence: this is not a comment on the writing. Your page reads exactly as a firm of your standing should, and we would not suggest changing its tone or losing that copy. The point is narrower, and it is about what the first sixty words do rather than what the page says overall.

The vocabulary has the same problem. We took the distinctive phrases from your page and checked how often Canadians search each one:

YOUR PAGE SAYS	SEARCHES/MONTH (CANADA)	PEOPLE SEARCH	SEARCHES/MONTH (CANADA)
goals-based wealth architecture	0	financial advisor	**12,100**
disciplined capital stewardship	0	how to choose a financial advisor	**8,100**
integrated wealth solutions	0	wealth management	**8,100**
boutique wealth management	20	retirement planning	**3,600**
intergenerational wealth transfer	20	estate planning	**2,900**
high net worth	210	succession planning	**1,300**
TOTAL	**~250**	**TOTAL**	**~36,100**

Added up, the phrases on your page draw about 250 searches a month between them. The phrases your clients use draw about 36,100. When the words on your page and the words in someone's question have almost nothing in common, an assistant has very little to connect the two.

What an answer-first opening could look like. This is an addition, not a replacement. Your existing copy can sit directly beneath it and keep doing its job for the reader who has already arrived. This is about giving the assistants something to quote in the place they are most likely to look:

> ***Sample Wealth Inc. is an independent wealth management firm in Toronto. We manage $7 billion for private families, business owners, and a small number of foundations across Canada. Beyond investment management, we plan estates, business sales, succession, and charitable giving. We are independently owned, and thirty-five people work here.***

Four sentences, and between them they cover your name, what kind of firm you are, your city, everyone you serve, your scale, the range of what you do, and your independence. Each is a sentence an assistant can lift and quote, and none of it costs you the writing you already have.

A NOTE ON THIS SAMPLE

In a real audit, this paragraph is drafted from your own material: your pitch book, your team page, the way you describe yourselves in a first meeting. The figures above belong to a firm we invented. The method behind them does not.

One page, worked through. To show what this looks like in practice, here is your home page against the searches it could realistically answer:

PAGE	THE SEARCH IT COULD ANSWER	VOLUME/MO	WHAT WOULD NEED TO CHANGE
Home	wealth management toronto	390	Toronto is in your page title and in the address at the foot of the page, but not in the opening lines, which is where assistants take most of what they read
Home	private wealth management toronto	90	The page never states who you look after or at what scale. An assistant weighing any question about client type or size has nothing on the page to weigh against
Home	business succession planning	880	Your page covers this ground as "liquidity events" and "ownership transition." Both are accurate. Neither is what people type

A note on how your site is built. Your main pages carry a lot of ground each, and two pieces of evidence explain why that costs you.

Assistants do not read a page the way a person does. When one answers a question, it does not absorb your whole page and summarise it. It pulls a slice, a few hundred words, from each source it draws on. The most detailed look at this behaviour, which examined how Google assembles its AI answers across 7,060 questions, found the typical slice is about 375 words per source, and that once a page runs past roughly 1,500 words the extra length is largely not read at all.

Where that slice comes from matters just as much. A separate study of more than 18,000 AI citations found the quoted material clusters near the top of a page and thins out toward the bottom: content in the final third is used roughly half as often as content in the first third.

~375

words: the typical slice an assistant reads from a single source.

1,500

words: past roughly this length, the extra page is largely not read at all.

Figures as cited in the passage alongside. Real research, not sample data.

Put those two together and you can see what one long page costs you. Whatever subject sits below the first screen or two is mostly outside what gets read. A page covering six subjects has five of them sitting in that position.

Ordinary Google search pushes the same way. A page carries one title and one main subject, and Google ranks it on that basis. A page trying to answer six different questions competes weakly for each of them, where six focused pages would each compete properly for one.

Our own published study of the Canadian wealth category shows what this produces: 78% of the citations pointing at firms' own websites went to pages other than the homepage. The firms that get found are getting found through pages built to answer one question.

None of this argues for breaking your site apart for its own sake. It argues for giving your most important questions their own pages, while keeping the site pleasant to read for the person who lands on it.

78%

of citations to firms' own websites went to pages other than the homepage.

Figure as cited in the passage alongside. Real research, not sample data.

4 · Where your visibility goes today

That covers your own pages. The other two explanations sit outside them, and this section takes both, starting with the one we can measure.

First, the good news: nothing is shutting the assistants out. Every website carries a short instruction file saying which parts of it automated visitors may read (it is called robots.txt), and yours welcomes all of them, including the ones the AI companies send. Your pages also arrive complete and readable. Nothing technical stands between these systems and your content. The question is what they do with it once they have it.

Across our twenty answers, the assistants cited 241 sources drawn from 139 different websites. Six of those citations pointed at pages of yours: three to your home page, three to a single blog post from last spring.

PAULA'S PUBLISHED MARKET STUDY · JUNE 2026

Real research · fifteen questions · daily for two weeks · the whole Canadian market

To put that in context, we can look outside this audit entirely. In June we published a separate study of the Canadian wealth category as a whole. That one was a different exercise: fifteen questions, run every day for two weeks, across the same four assistants, covering the whole market rather than a single firm. Its citation tables are public.

Two findings from it matter for you. The first is the one already mentioned: 78% of the citations that pointed at firms' own websites went to pages other than the homepage. Six of your citations went to two pages, and one of those pages is your front door. The second is that one advisor practice page in that study drew 38 cited answers over the same two weeks. A single practice page can carry real visibility. Yours is a long way below that.

38	6
cited answers drawn by a single advisor practice page over two weeks.	citations pointed at pages of yours in this audit, across two pages.

The other explanation sits off your website entirely. When assistants put together answers about wealth management in Canada, they draw on community forums, trade press, personal finance media, and regulators alongside firms' own sites. You do not currently appear in any of them. That is common for a firm your size, and it is also where a good share of the visibility you want eventually comes from.

5 · What we found on your pages

This section is the practical one: the specific things on your site that help or hinder, and which of them are yours to change.

We examined twelve pages: your home page, your services and team pages, your six most recent blog posts, and two files that sit behind the scenes. We also ran a check by hand, because it is a common way for a site to fail invisibly. Many websites send a nearly empty page first and fill in the words a second later, once the browser has done some work. A person never notices. Some automated visitors do not wait for that second step, so they see the empty version.

Your main content passes this test. The words, links and headings on your pages are all in the first version your server sends. Together with an open door and quick loading, the technical groundwork is solid.

What follows is on your side of the line, roughly in the order we would tackle it.

PRIORITY	FINDING	WHAT WE FOUND
FIX FIRST	**Your best piece of writing cannot be read by any assistant**	Your guide to selling a business and what comes after it runs to forty pages and answers, in detail, the exact question two of our five prompts asked. It sits behind an email form as a PDF. Nothing behind that form exists for an AI assistant. The strongest evidence you have that you understand what these families are going through is invisible to every system we tested
FIX FIRST	**Your team page names people without saying who they are**	Your team page lists thirty-five people with their titles and photographs. It does not say what any of them has done. There are no credentials, no career history, and no areas of focus. Assistants attach authority to named people whose background can be checked, and there is nothing here to check. This is the cheapest gap on the list to close, because the material already exists in your pitch materials

PRIORITY	FINDING	WHAT WE FOUND
FIX SOON	**Everything you publish is dated commentary**	Six posts in the past year, all of them well written, and all of them about the quarter that just ended. None of them answers a question a prospective client would ask before they know you, and a market note stops being useful within weeks of being written
FIX SOON	**Two versions of several pages are competing with each other**	Your move to the new site left the old addresses live alongside the new ones, with no instruction telling search engines which is the real one. Fourteen pages are affected. Google is choosing for you, and on four of them it has chosen the old version, which is missing your last two years of work
NOT A PROBLEM	**Two things we checked and would not worry about**	Alongside the words a visitor reads, a page can carry labels that only machines see, spelling out what the page is and who it concerns. Yours are there and correctly written. Our own published research finds these labels do not measurably change how often AI names a firm, so this is neither a gap nor a project worth buying. The same goes for a file called llms.txt, which some vendors will offer to add: we find no evidence it affects AI citations today

One observation rather than a recommendation. The three answers you did appear in were all about business succession, which is also the subject of the guide sitting behind your form. Whether that points at a narrower position for the firm, or simply at which pages to build first, depends on things we do not know about your plans, and it is a conversation rather than a fix.

6 · Where this leaves you

In short: the assistants can read you perfectly well, and they already name you occasionally. What they find is thin, and your best material is out of their reach. The firms that appear more often than you do are there for reasons we can measure and you can match.

GET DEEPER INSIGHT AND SPECIFIC RECOMMENDATIONS

AEO Assessment & Roadmap

This audit was free, and it is a diagnosis. The paid assessment goes further in every direction: it measures properly over time, works out who is winning and how, and hands your team a plan they can act on. What it covers:

1. **A prompt set built with you, not for you.** The five questions in this audit came from search data alone. The real set is developed with your team in a working session: the questions tied to your growth plan, the ones your best clients asked before they found you, the ones that decide a mandate. Agreed and written down, so that everything measured afterwards is measuring something you actually want to win.
2. **Measurement over four to six weeks.** One day cannot separate a real position from a bad afternoon. Running the set repeatedly tells you where you genuinely stand, and shows the movement as fixes go live rather than leaving you to wonder whether they worked.
3. **The firms winning your questions, named, and why.** Not only who appears where you do not, but what each of them is doing to earn it: the page, the source, the phrasing. Without that, you know you are behind but not what to do about it.
4. **How you are described, not just whether you appear.** An assistant rarely just lists a firm. It characterises it. We track what is being said about you, and about the firms you compete against.
5. **The full question and keyword map.** Every page you have, and several you do not yet, set against the searches and prompts each could realistically win. This audit worked one page through as an example. The assessment covers every page.
6. **Content recommendations tied to those openings.** Which pages to write, which to rewrite, and what each needs to say in order to answer a question that is currently being answered by somebody else.
7. **Technical fixes written for your developers.** Not a list of problems, but the specific changes, in the order they should be made, in language your web team can act on without translation.
8. **A route into the sources that decide your category.** The forums, trade press and directories the assistants lean on, which of them matter for Canadian wealth management, and a realistic path into each.
9. **Re-measurement, so you know it worked.** The same prompt set, run again once the work has landed. You see what changed, instead of taking our word for it.

If it would be useful, we would welcome the conversation.

→ paulainc.ca/aeo-for-financial-services

ABOUT THIS SAMPLE

This is a sample. Sample Wealth Inc. does not exist, and every figure describing it is illustrative. The Canadian search volumes are real, and so are the findings from our published market study. If you would like this run on your own firm, the audit is free.

About Paula

Paula Inc. is a Toronto digital agency focused on financial services. We help firms be found and chosen at a time when AI increasingly does the finding.

01 **Brand and website.** What a prospect finds, and whether they believe it.

02 **Funnels and measurement.** Landing pages, CRM, follow-up, tracking.

03 **SEO and AI visibility.** Being found, and being the firm the AI names.

04 **AI adoption.** Making Claude your most productive employee.

We publish our research and our methods, including the ones that show our own limits, at grow.paulainc.ca/insights.

HOW TO REACH US

WEBSITE	paulainc.ca
EMAIL	info@paulainc.ca
PHONE	+1 (647) 250-7374
LINKEDIN	linkedin.com/company/paula-inc

Paula Inc. · Toronto · paulainc.ca