Jemstep
Digital Strategy Proposal

August 3, 2016

For Invesco internal use only

Agenda

Business Opportunity

Presentation and Business Objectives

Current State & Competitive Landscape

Jemstep Digital Strategy Proposal

- Site Navigation Flow | Taxonomy | Content Architecture
- UX Wireframes
- Road Map

Appendix

For Invesco internal use only

Presentation Objectives

- Present the digital strategy proposal for Jemstep strategic alignment and integration with PowerShares and the broader Invesco digital presence
- Outline a proposed governance structure and support model for ongoing web maintenance and project support
- Solicit feedback from key stakeholders on the plan, potential roadmap and next steps

For Invesco internal use only

Business Objectives

Jemstep:

- Capitalize on strength of Invesco and PowerShares digital client engagement activity through:
  - Digital promotion
  - Magnolia platform integration
  - Cross-linking
- Leverage Invesco IT and Digital Marketing resources to implement Jemstep's digital strategy

Invesco and PowerShares:

- Leverage Jemstep.com to cross-promote Invesco solutions, global investment management expertise and thought leadership
- Enhance Invesco and PowerShares digital client experience for Advisors & RIAs by providing seamless access to Jemstep's technology platform solution

For Invesco internal use only

The Opportunity

- There is an opportunity to lead over other investment brands (who have robo-advisors) and create a content strategy and plan for Jemstep—same way Goldman Sachs appropriated the innovation positioning through their content approach to **Internet of Things (IoT).**

- Part of the content strategy would include our SEO, paid search and social/PR outlets to leverage awareness, search engine visibility and add credibility to Jemstep. Although we are not going direct-to-consumer, we are rebranding Jemstep and therefore, important for advisors, consumers (their clients) and media to understand our value proposition.

- Also, great opportunity to weave in other key value props like our new PowerShares approach, Invesco Solutions and Investment Consulting.

For Invesco internal use only

The Opportunity

- Create a content strategy aimed at gaining market share and brand awareness over other robo-advisors offered for financial advisors. The content strategy would include:
  - SEO, paid search and social/PR outlets to leverage awareness, and search engine visibility for Jemstep.
  - Leveraging Invesco PowerShares , Invesco Solutions and Investment Consulting value proposition

For Invesco internal use only

Current State & Competitive Landscape

Current State & Competitive Landscape

We compared Jemstep against the below robo-advisors, based on compatibility with Jemstep platform and relevant market share:

Jemstep by Invesco

vs.

B2B / B2C

Betterment

FutureAdvisor

Financial Guard

B2B

trizic

NestEgg

Custodian	Robo-technology offered
TD Ameritrade	**Jemstep**, **trizic**, **NestEgg**, Oranj, blueleaf, wealthaccess, balance, modestspark, envestnet, investcloud, auto pilot, synapse vanare
Pershing	**Jemstep**, SigFig, **NestEgg**, Marstone

For Invesco Internal Use Only

Current State & Competitive Landscape
Jemstep.com

Strengths

- Articulated 'Advisor' value proposition on homepage hero
- Mobile-responsive
- Calls-to-action (CTA) prominently featured on home page

Key Issues

- Complex navigation structure and labeling
- Can improve mobile-responsive UX
- Dated editorial/digital content strategy
- Lack of sponsorship or referrals from financial media outlets to strengthen brand awareness
- No integration with Invesco or Invesco PowerShares websites

FOR INVESCO INTERNAL USE ONLY

Competitive Matrix

Robo-advisors: Web and Mobile Features

Robo-Advisor	Interactivity (charts, graphs, etc.)	Website main navigation	Resources center	Live chat feature	Financial PR outlets promoted on site	Vertical scroll-down experience	Customized client management portal	Demo video	Mobile app (iOS)	Mobile app (Android)
Jemstep by Invesco		●					●			
Betterment INSTITUTIONAL	●	●	●	●	●	●	●		○	○
NESTEGG		●				●	●		●	●
trizic		●				●	●		○	○
FutureAdvisor	●	●	●		●	●			○	
Financial Guard						●				

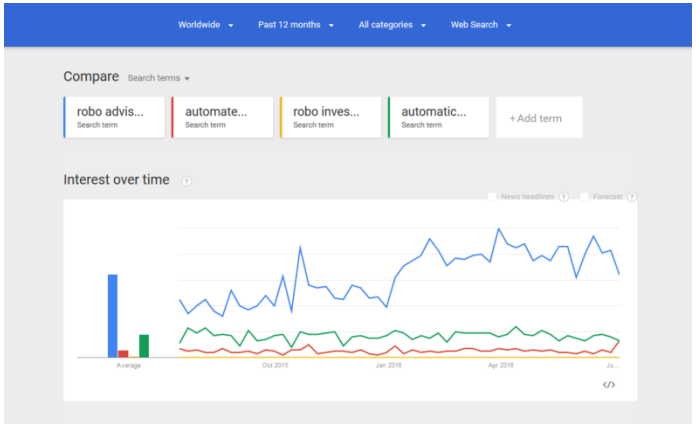
○ = targeted for the individual investor audience

Current State & Competitor Landscape

SEO Analysis | Social media

- **SEO Strategy**
  - Performed SEO and keyword analysis (high volume/competition) for future digital content
  - Ran Google Trends to understand search terms trending globally
  - Ran SpyFu to determine competitors' rankings
  - Devised SEO / SEM recommendations
- **SERPs**
  - Ran tests on keywords to assess location of competitors on SE results pages.
- **Social Media Analysis**
  - Ran tests on Buzzsumo tool and social media channels to assess competitive status on social media

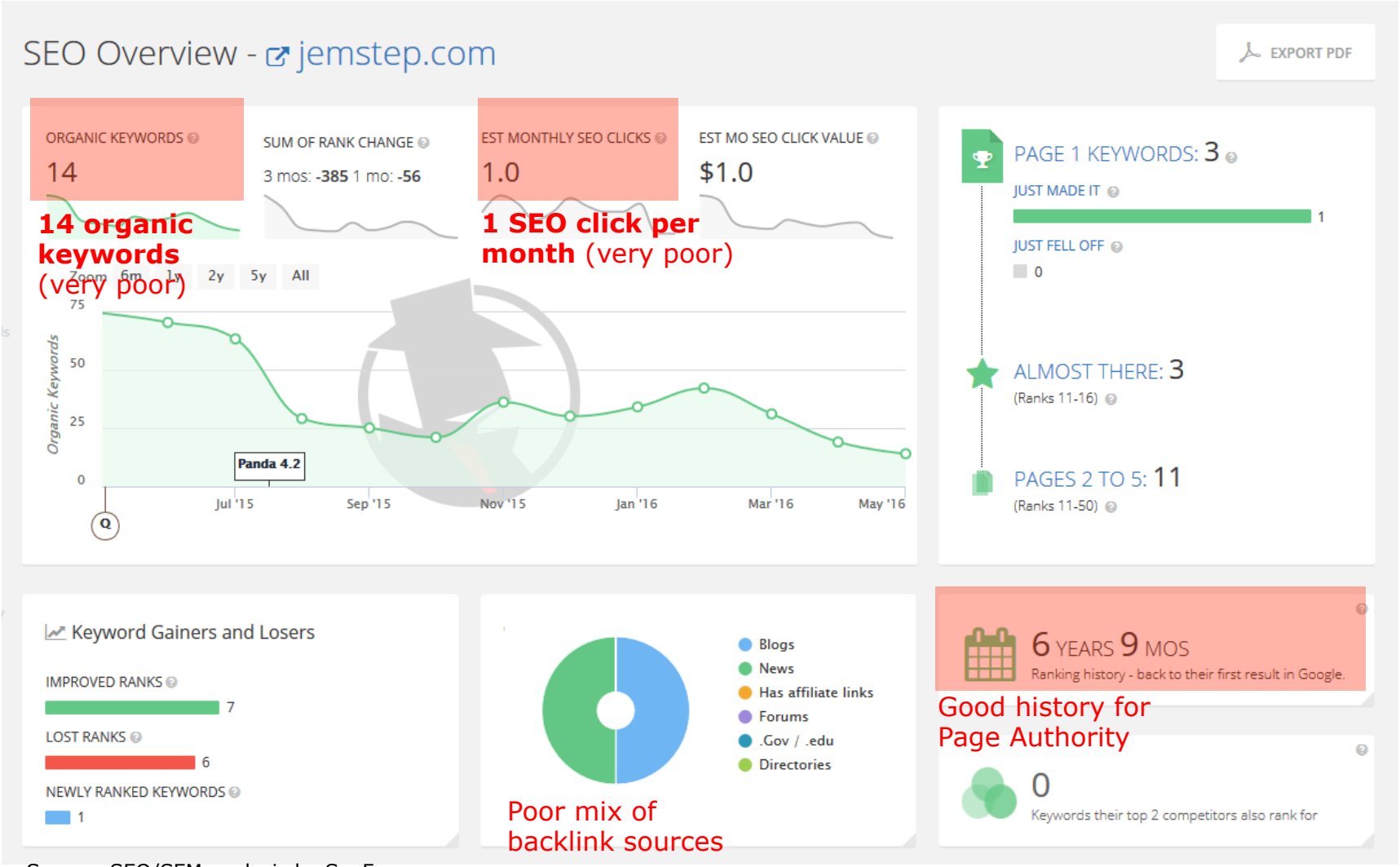
term	full_url	Local Monthly Search volume	Global Monthly search volume
best way to invest money	futureadvisor.com/content/resources/getting-started/how-to-invest/50k-dollars	4,400	6,600
short term investments	futureadvisor.com/content/resources/getting-started/portfolio-strategy/long-term-vs-short-term-investing	2,900	4,400
advisor.fidelity	futureadvisor.com/content/what-we-do/faq	2,400	2,400
advisor fidelity	futureadvisor.com/content/what-we-do/faq	2,400	2,400
best short term investments	futureadvisor.com/content/resources/getting-started/how-to-invest/20k-dollars	1,600	2,400
free financial advice	futureadvisor.com	590	1,900
best place to invest money	futureadvisor.com/content/resources/getting-started/how-to-invest/50k-dollars	880	1,900
financial online advisor	futureadvisor.com	0	1,450
best way to invest	futureadvisor.com/content/resources/getting-started/how-to-invest/50k-dollars	480	880
online financial advisor	futureadvisor.com	590	720
advisor online	futureadvisor.com	90	590
free financial advisor	futureadvisor.com	390	590
online financial planning	futureadvisor.com	320	590
online financial planner	futureadvisor.com	320	480
advisor com	futureadvisor.com/signin	260	480



FOR INVESCO INTERNAL USE ONLY

Current State & Competitive Landscape

SEO/SEM current state: Jemstep



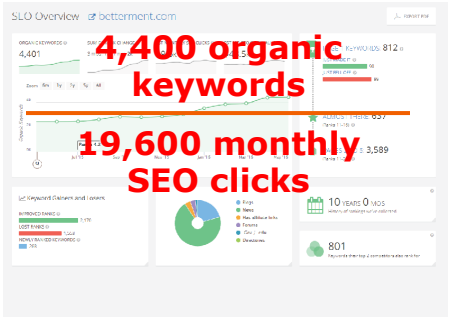
Source: SEO/SEM analysis by SpyFu

Current State & Competitor Landscape

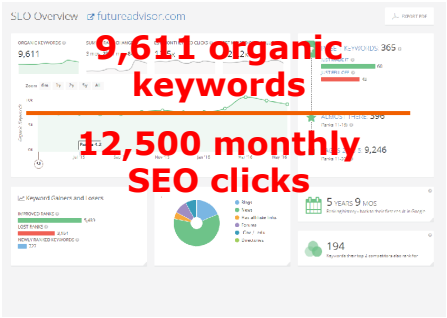
SEO/SEM current state: competitors

Click on screenshot for full report on SEO/SEM

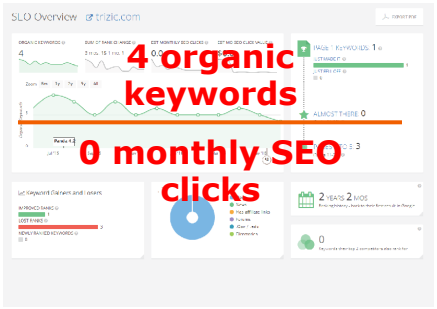
Jemstep



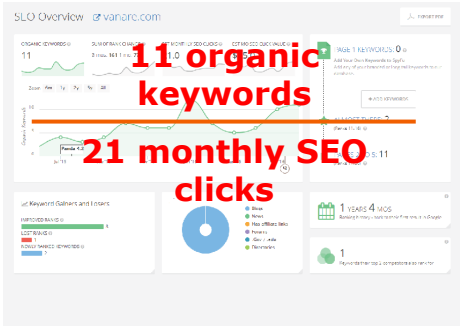
Betterment



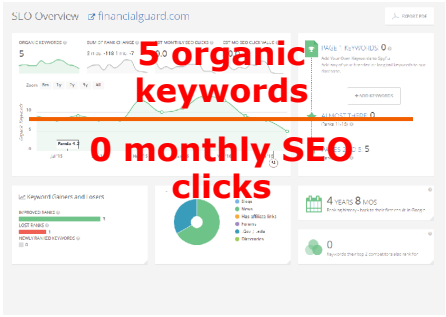
FutureAdvisor (best in class)



Trizic



NestEgg (Vanare)



Financial Guard

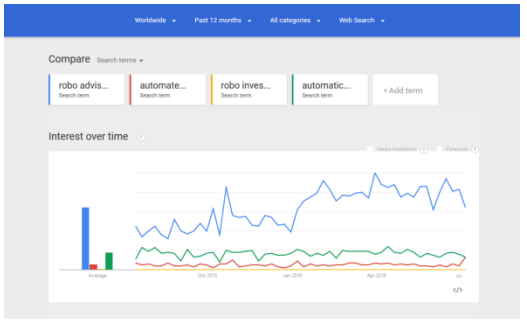
Source: SEO/SEM analysis by SpyFu

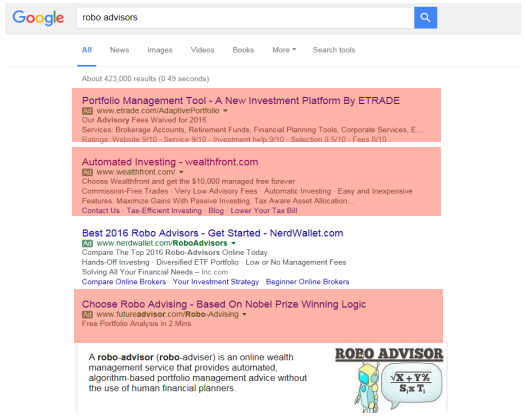
For Invesco Internal Use Only

Current State & Competitive Landscape

Key SEO findings

- "Robo advisor" is outperforming other search terms by far (opportunity)
- Search for BlackRock's robo advisor has surged 700%, debunking other competitors
- Paid search/Sponsored Results is widespread. Few key players rank high for organic results
- Jemstep's organic keywords rank
  - Significantly lower than other B2C/B2B competitors (Betterment and FutureAdvisor)
  - Equal to B2B competitors (NestEgg, Trizic)
- Some domains have over 10 years of existence, helping their Page Authority





term	full_url	Local Monthly Search volume	Global Monthly search volume
best way to invest money	futureadvisor.com/content/resources/getting-started/how-to-invest/50k-dollars	4,400	6,600
short term investments	futureadvisor.com/content/resources/getting-started/portfolio-strategy/long-term-vs-short-term-investing	2,900	4,400
advisor.fidelity	futureadvisor.com/content/what-we-do/faq	2,400	2,400
advisor fidelity	futureadvisor.com/content/what-we-do/faq	2,400	2,400
best short term investments	futureadvisor.com/content/resources/getting-started/how-to-invest/20k-dollars	1,600	2,400
free financial advice	futureadvisor.com	590	1,900
best place to invest money	futureadvisor.com/content/resources/getting-started/how-to-invest/50k-dollars	880	1,900
financial online advisor	futureadvisor.com	0	1,450
best way to invest	futureadvisor.com/content/resources/getting-started/how-to-invest/50k-dollars	480	880
online financial advisor	futureadvisor.com	590	720
advisor online	futureadvisor.com	90	590
free financial advisor	futureadvisor.com	390	590
online financial planning	futureadvisor.com	320	590
online financial planner	futureadvisor.com	320	480
advisor com	futureadvisor.com/signin	260	480

Source: Google Trends, SpyFu, Google and Bing search. Search restricted to global searches performed in English language during the past 12 months.

For Invesco Internal Use Only

Current State & Competitor Landscape
SEO Analysis | Social media

Invesco

facebook

Jemstep	7,268 page likes
Betterment	31,451 page likes
FutureAdvisor	21,767 page likes
Vanare (NestEgg)	61 page likes
Financial Guard	374 page likes

twitter

Jemstep	2,488 followers | 3,073 tweets
Betterment	24,000 followers | 7,049 tweets
FutureAdvisor	33,000+ followers | 6,332 tweets
Trizic	245 followers | 185 tweets
Vanare (NestEgg)	318 followers | 119 tweets
Financial Guard	2,159 followers | 268 tweets

in

Jemstep	504 followers
Betterment	8,673 followers
FutureAdvisor	2,381 followers
Trizic	236 followers
Vanare (NestEgg)	109 followers

Source: Social media readings of all three biggest influencers vs Jemstep.
Competitors not listed are N/A for social engagement.

For Invesco Internal Use Only

Current State & Competitive Landscape
Key Social Media findings

- Jemstep stands behind the main B2C/B2B competitors on social media, with Betterment leading the scores in amount of followers and user engagement (likes, retweets, shares)

- Jemstep stands in a good place compared to other B2B-only competitors—a strategy to maintain. Published content on Jemstep's Facebook, Twitter is considerable, with potential to leverage Linkedin (B2B) social engagement.

- Betterment, FutureAdvisor lead the social scores by far, capturing mostly an investor audience through positive interactions

Source: Buzzsumo tools, Facebook, Twitter, LinkedIn

For Invesco Internal Use Only

Current State and Competitor Landscape

Summary of best practices | Scorecard

Attributes	Jemstep	Betterment	Trizic	NestEgg	Future Advisor	Financial Guard
Simplicity of UX & navigation	Good	Very good	Good	Good	Very good	Good
Visual approach	Very good	Very good	Very good	Very good	Very good	Good
Mobile-centered approach or Mobile App	Poor or N/A	Very good	Good	Very good	Good	Good
SEO rankings	Poor or N/A	Very good	Poor or N/A	Poor or N/A	Good	Poor or N/A
PPC effort	Poor or N/A	Good	Poor or N/A	Poor or N/A	Very good	Poor or N/A
Social Media presence	Good	Very good	Poor or N/A	Good	Very good	Poor or N/A
PR/Media support	Poor or N/A	Very good	Poor or N/A	Good	Very good	Poor or N/A
Presence of Interactive Tools	Good	Very good	Poor or N/A	Poor or N/A	Good	Good
Multimedia content	Poor or N/A	Good	Poor or N/A	Poor or N/A	Very good	Poor or N/A

Very good Good Poor or N/A

For Invesco Internal Use Only

Current State and Competitor Landscape

Best practices & recommendations

UX / Navigation efficiency	▪ **Simplify navigation** with a scroll-down landing page that includes all key content for Jemstep (a popular trend with e-wallets and mobile money management apps) ▪ **Condense navigation** features and label content in a more intuitive way
Mobile approach	▪ Develop a **100% responsive website**, but also place the mobile interaction at the front and center of the user experience ▪ Create a **mobile application**
PR / Social proof	▪ PR: Add **financial media outlets sponsorships/mentions strategy** to further build credibility to the Jemstep platform ▪ Social: include a **social media content strategy** adding relevant content to leverage mentions and increase engagement rates ▪ Devise an **Email marketing campaign, Linkedin PPC ads and other highly targeted tactics** to engage specific advisors about the platform
Good SEO / SEM standards	▪ Include more **relevant keywords** in the main content pages ▪ Use of **cross-linking within Invesco websites** and web referral sources for inbound linking ▪ Devise a **Paid Search strategy** to cope with paid search volume by key competitors
Use of Interactive Tools	▪ Incorporate **interactive tools** to help advisors showcase financial scenarios to their clients
Leverage resources content	▪ Add **educational resources** as a marketing value for advisors and **cross-link** to other Invesco properties
Good use of multimedia content	▪ Increase user engagement through ambient video, demo video (upon request) and tutorials (Resources) that may work as sales support tools

For Invesco internal use only. Not for further distribution
For Invesco Internal Use Only

Digital Proposal

Content Strategy & UX Framework

Content Strategy & UX Framework
Current vs. Future site architecture*

*Based on comparative analysis of best competitors' site architectures

We went from…
- Non-intuitive labeling
- Non-user oriented
- Extensive navigation menu

To…
- **Intuitive labeling**
- **User-oriented**
- **Short navigation menu**

Current site architecture	
Home	**L1**
Features	
	Attract
	Engage & Convert
	Onboard
	Manage
	Service
Partners	
Industry focus (News)	
About (Team)	
Careers	
Contact	
Clients (log in)	

Recommended site architecture	
Home	**L1**
Take a tour	
Why Jemstep	
	Jemstep overview
	Value proposition
	Innovation at Jemstep
	Team
	News
What we do	
	Automated investing
	Passive investing
	Jemstep features
	ETFs
	Invesco Solutions
	Invesco Consulting
Resources	
	Demo
	Research library
	Tools
	FAQ
	Contact us
Client login	

Content strategy, UX framework
Story flow

Consideration Stage | **Desired Action**

Content Strategy

Learn

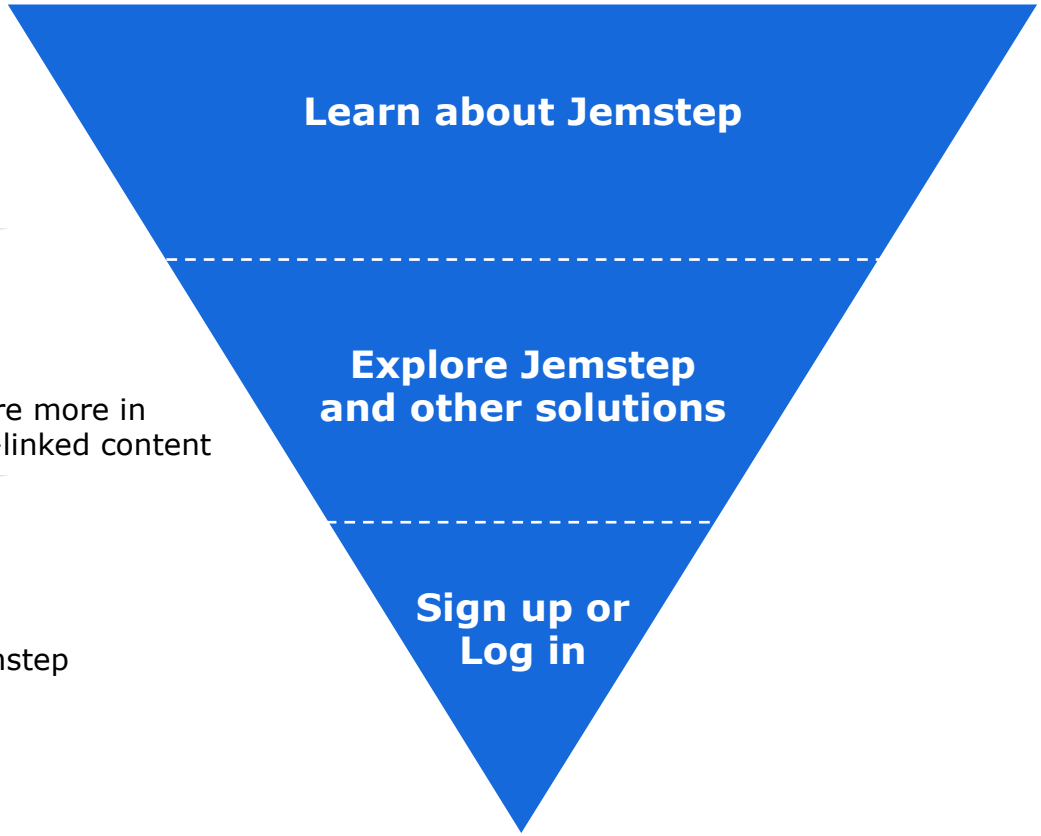
Goal: To inform visitors about the differentiate and innovative approach to Jemstep

Consider

Goal: To give visitors the ability to explore more in depth features about Jemstep and cross-linked content

Take action

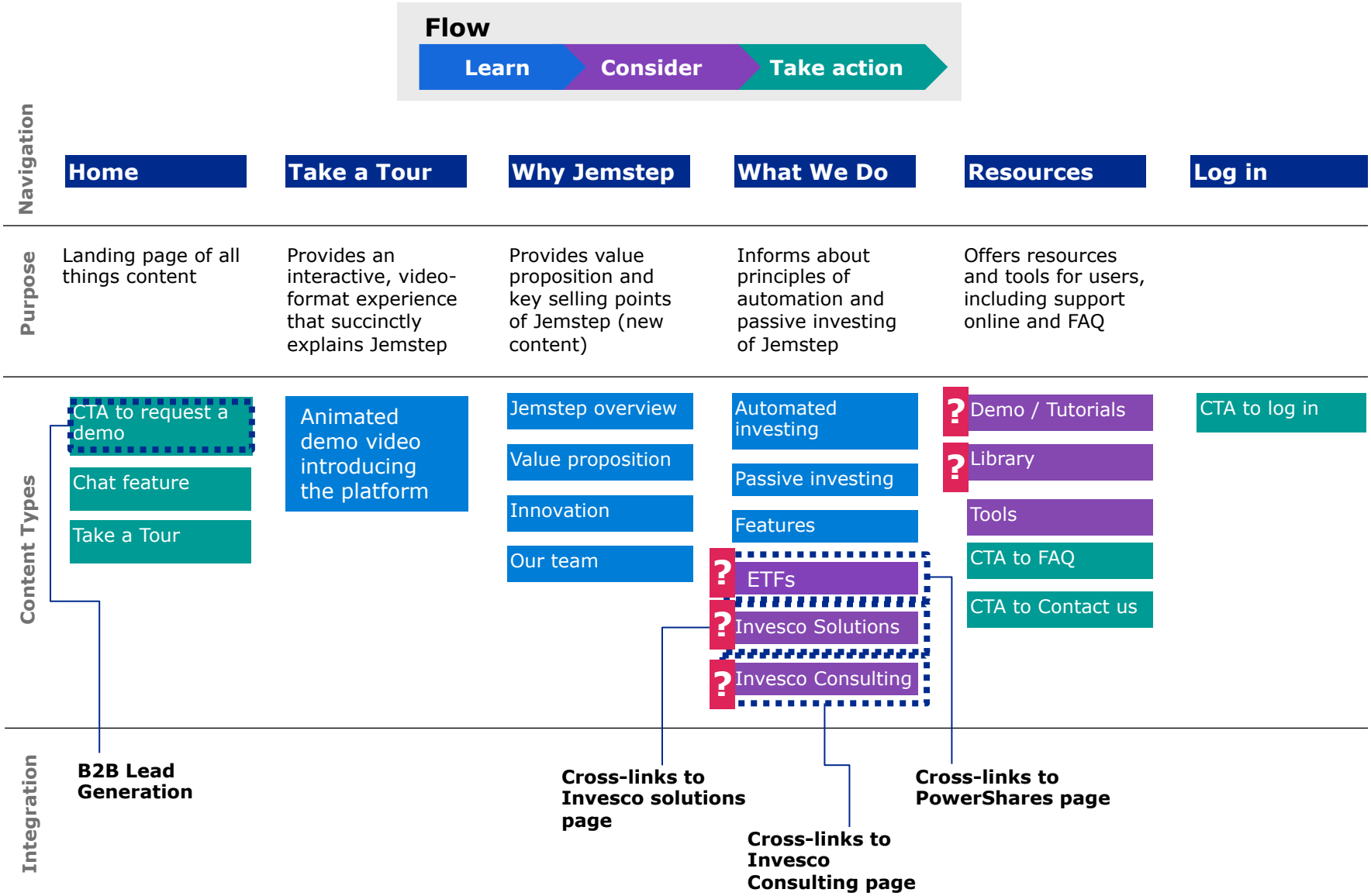
Goal: To entice users to reach out to Jemstep



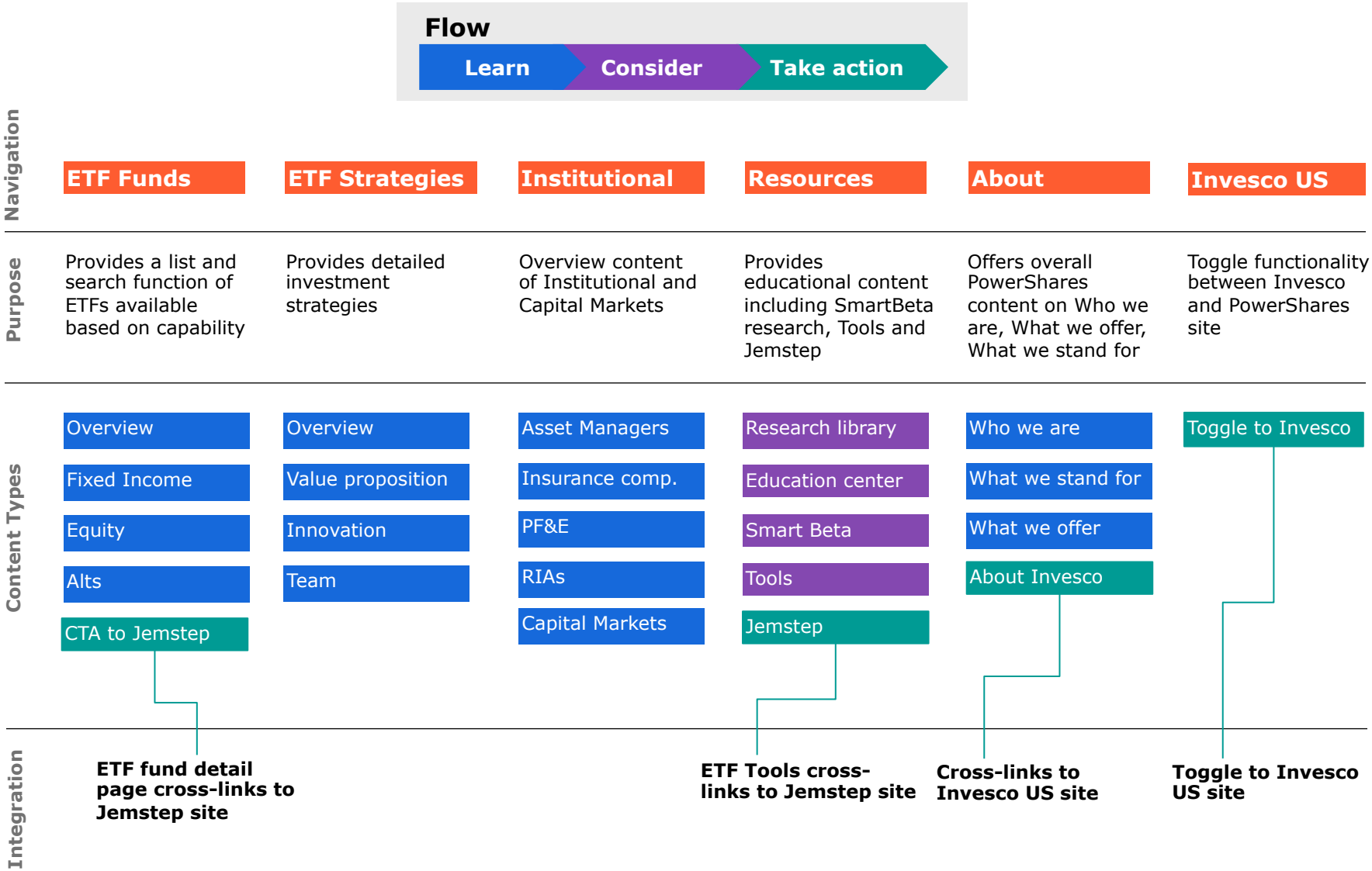
Flow

Learn → Consider → Take action

Content strategy, UX framework
Jemstep.com Taxonomy



Content strategy, UX framework
PowerShares.com Taxonomy



Digital Client Experience

Digital client experience | Jemstep.com
Landing Page

Audience

- Financial advisor
- RIA

Device

- Desktop
- Tablet
- Phone

https://invis.io/C280T2D3V

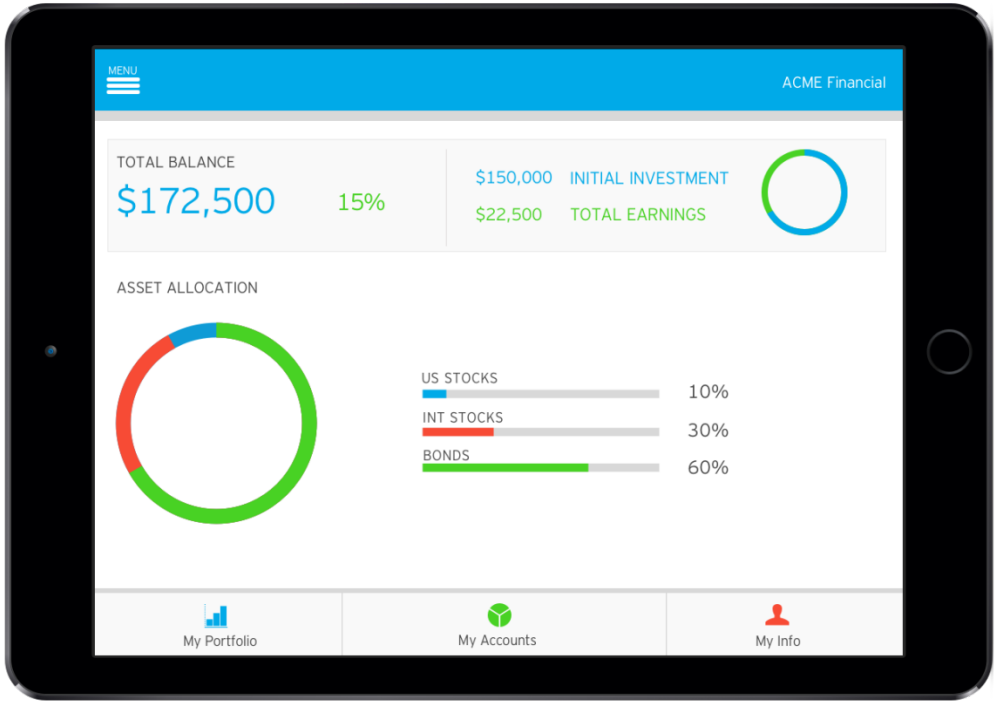
https://invis.io/BT83AXO8S

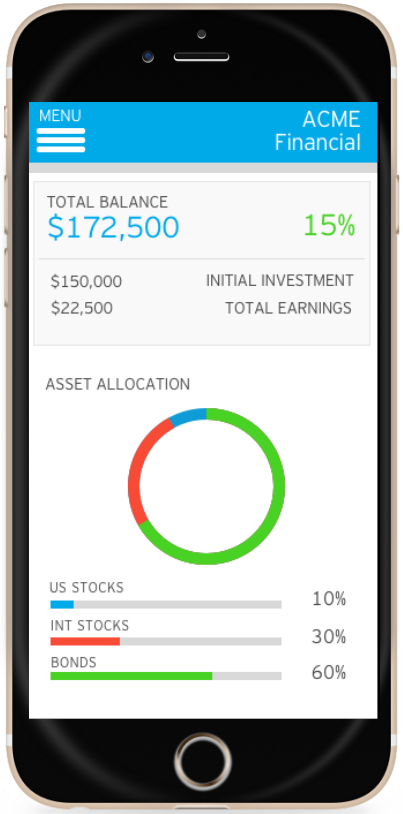
https://invis.io/BJ83AX7CZ

FOR INVESCO INTERNAL USE ONLY

Digital client experience | Jemstep Mobile App

Mobile Apps: iPad and iPhone





FOR INVESCO INTERNAL USE ONLY

Digital Client Experience – Key Features | Capabilities

- Simplified navigation with content focus on Advisors/RIAs
- CTAs front and center on home page
- "Take a tour" feature
- Ambient video, Demo video
- Request demo, Contact us, Chat features accessible on main pages
- Unique Selling Proposition around "one of the first digital solutions for advisors"
- Key value propositions attractive to Advisor/RIA audience:
  - White-labeled platform for custom experience and custom investment portfolios
  - Attract, engage prospects, onboard clients, access assets
- Seamless Integration with Sales/CRM resources (Orion, Veo Integrated, DocuSign, fiserv, salesforce)
- Inclusion of Featured News, Financial Media mentions
- Creation and implementation of Jemstep Mobile App
- Inclusion of Resources and Tools content (Research Library, Invesco Consulting, Invesco Solutions, etc.)

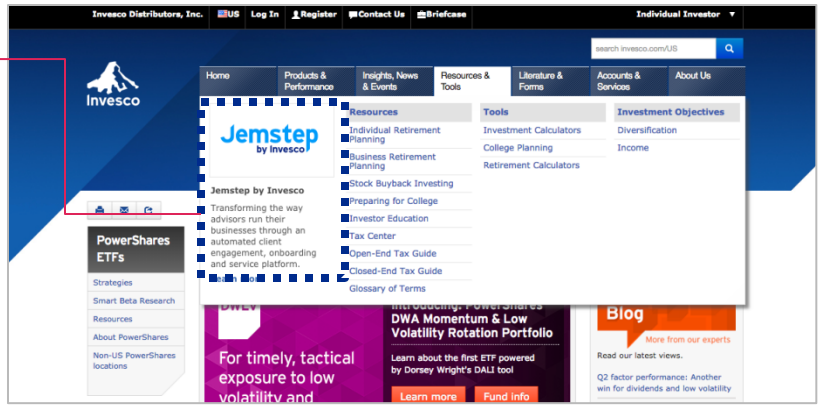
FOR INVESCO INTERNAL USE ONLY

Digital Client Experience | Cross-linking

Cross-linking items

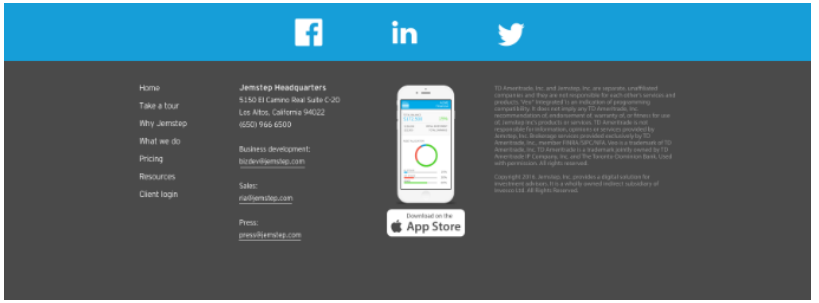
- Home Pages (on Jemstep.com, Invesco.com/us and PowerShares.com)
- Presence on mega menu (on Invesco.com/us)
- Resources and Tools, ETF Product detail pages, About us, Toggle functionality (on PowerShares.com)
- What we do (on Jemstep.com)
- Inbound links to Jemstep.com on:
  - Financial media / PR mentions
  - Linkedin, Twitter mentions
  - Targeted email marketing campaigns
  - Paid search marketing

Cross-links to Jemstep.com



Mega Menu on Invesco.com

PR mentions on Jemstep.com



Social / Mobile links on Jemstep.com

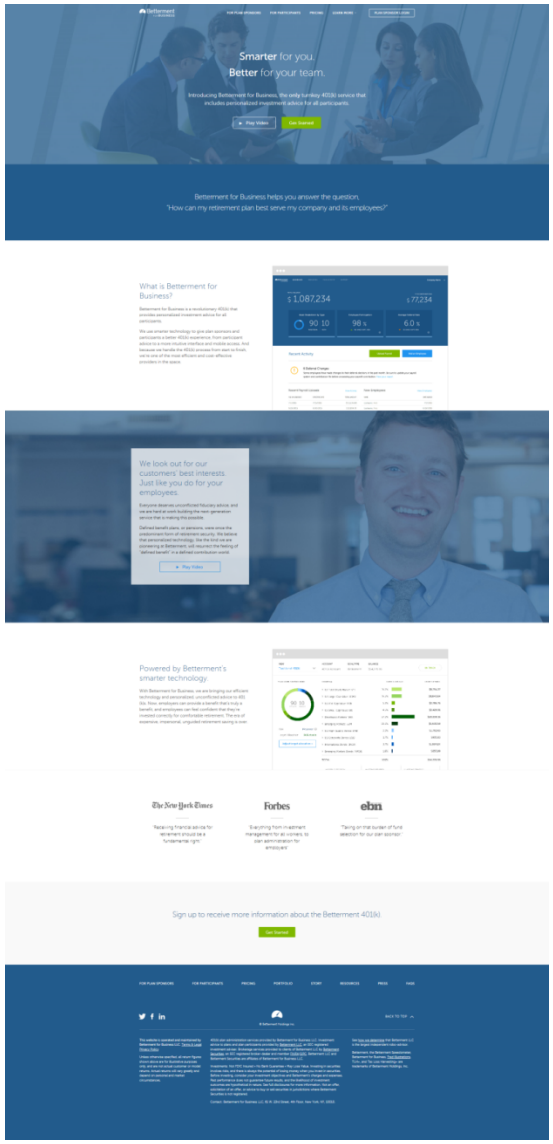
FOR INVESCO INTERNAL USE ONLY

Appendix

Current State & Competitive Landscape

Betterment for Business

- **Strengths**
  - Extremely simple and efficient user experience, with plenty of tools, videos, sliders and vector animation on homepage (best on multimedia content)
  - Dynamic input of content for customized results, directly on home page (name, retirement status and annual income to get started)
  - Mobile-responsive best practice with vertical scroll-down navigation
  - Backed by financial media outlets



 FOR INVESCO INTERNAL USE ONLY

Current State & Competitive Landscape
FutureAdvisor

- **Strengths**
  - Seamless user experience
  - Vertical scroll-down navigation
  - Backed by established institutions and mobile money management platforms
  - Backed by financial press sites
- **Key issues**
  - More complex site navigation than best in class sites
  - No integration with BlackRock (iShares) content

 FOR INVESCO INTERNAL USE ONLY

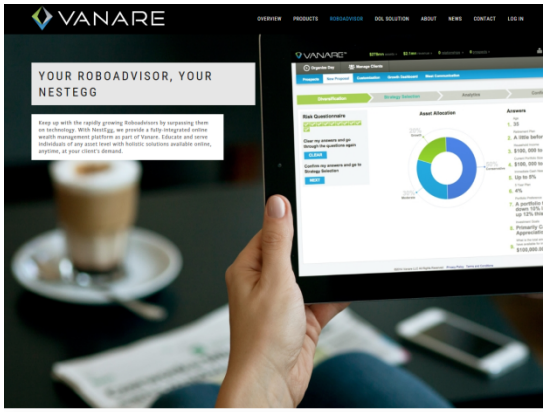
Current State & Competitive Landscape
Financial Guard

- **Strengths**
  - Simple U/X – clearly articulates three easy steps to get started
  - No main navigation, just one scroll-down landing page
  - Predominant CTAs and call to log in/sign up
- **Key issues**
  - Absence of social media and financial media outlet endorsements

FOR INVESCO INTERNAL USE ONLY

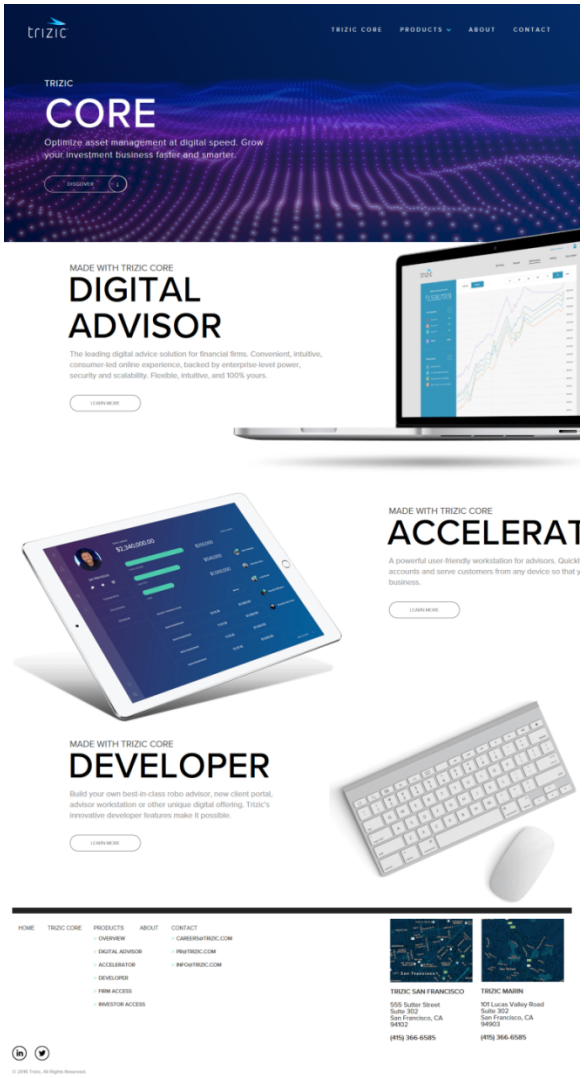
Current State & Competitive Landscape
NestEgg by Vanare

- **Strengths**
  - Simple U/X with intuitive navigation
  - Clean, predominant visuals and infographics
  - Clear value propositions
  - Predominant CTAs and call to log in/sign up
  - Domain dependent on Vanare (not stand alone robo-advisor site)
- **Key issues**
  - Absence of multimedia content



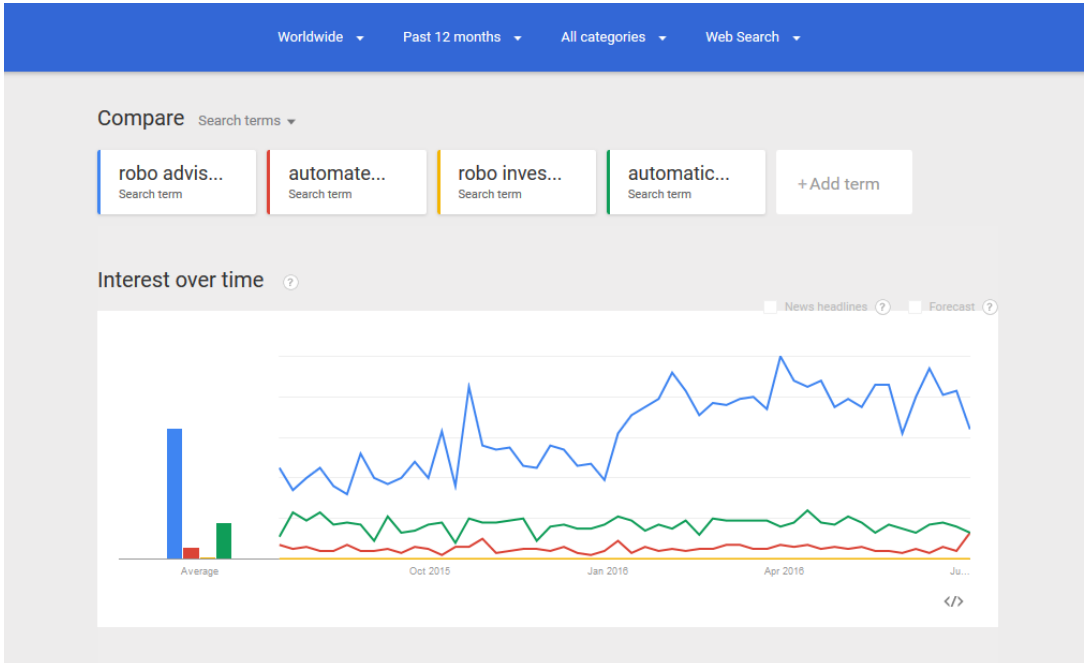
Current State & Competitive Landscape
Trizic

- **Strengths**
  - Simple U/X with easy navigation
  - Long scroll-down landing page
  - Predominant CTAs and call to log in/sign up
  - Mobile-centric approach with imagery of devices throughout
- **Key issues**
  - Absence of social media and financial media outlet endorsements
  - Absence of multimedia content



 FOR INVESCO INTERNAL USE ONLY

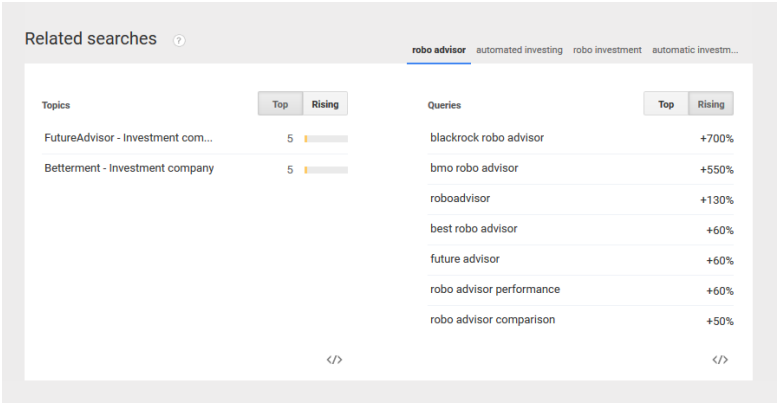
SEO Analysis
Global Trends



"Robo advisors" is outperforming other search terms by far.

The search term ranks highest and is on a clear uptrend, debunking other definitions of the industry, since early 2015.

This represents positive equity to bank on for SEO and awareness purposes: automated investing, robo investment and iterations of such terms are not ranking anywhere close to "robo advisors" and other iterations of such.

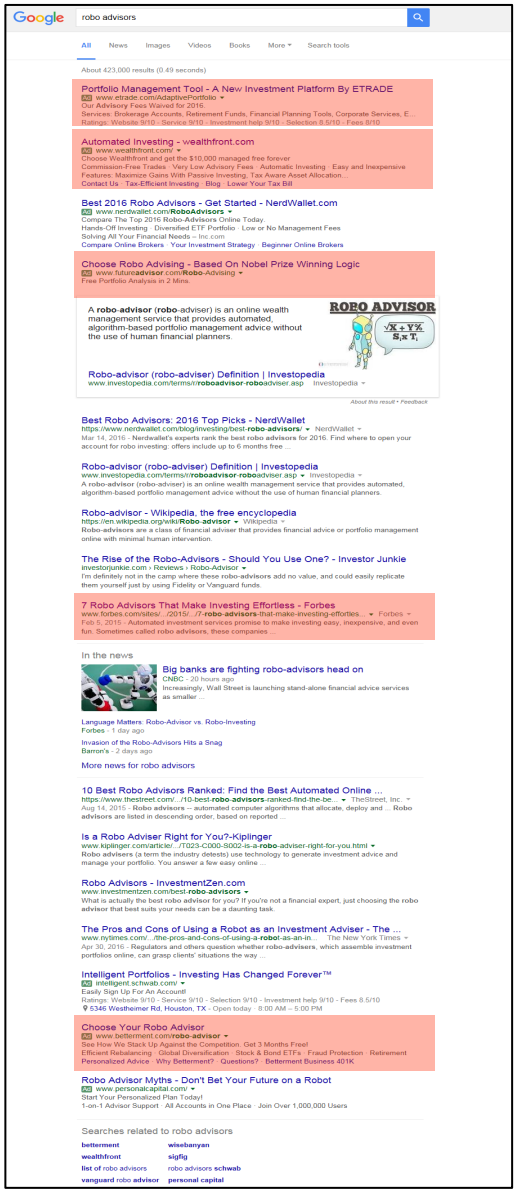


Search for BlackRock's robo advisor has surged 700%, with other search iterations also increasing.

Source: Google Trends. Search restricted to global searches performed in English language, during the past 12 months.

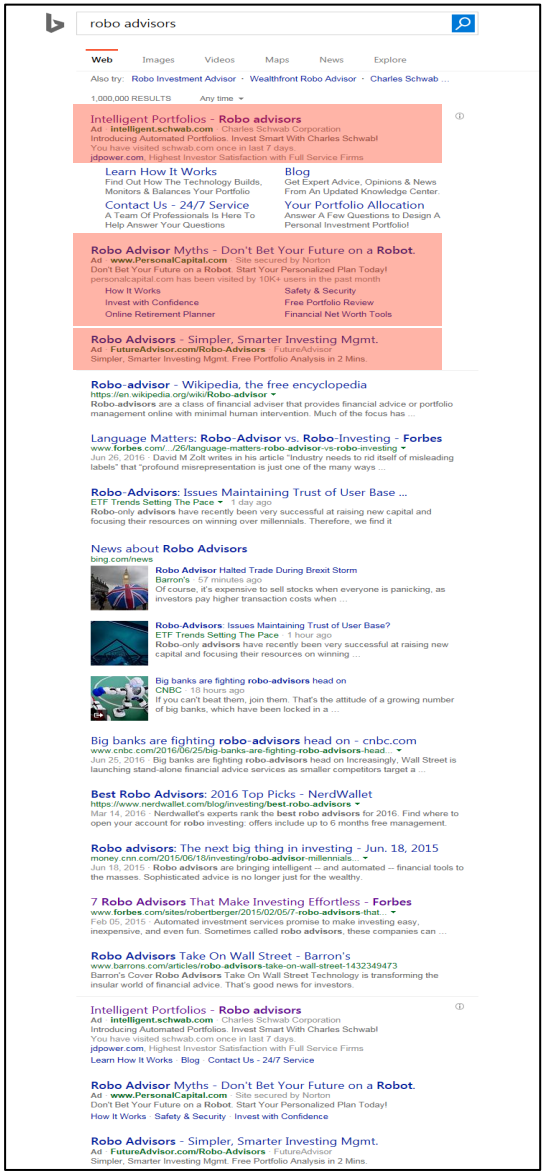
SEO Analysis

Keyword Strategy – Google/Bing SERPs



SERP on Google for 'robo-advisors' include main competitors already ranking high.

Paid search (sponsored results) is widespread on this platform for main industry competitors with a few organic results.



SERP on Bing for 'robo-advisors' result for the most part from paid search (sponsored results

SEO Analysis
Keyword strategy

Ad group	Keyword	Avg. Monthly Searches (exact match only)	Competition	Suggested bid
Keyword Ideas	sigfig	12,100	0.02	15.75
Keyword Ideas	robo advisors	9,900	0.37	6.91
Keyword Ideas	future advisor	9,900	0.15	2.41
Seed Keywords	robo advisor	8,100	0.3	4.22
Keyword Ideas	adviser or advisor	8,100	0	
Keyword Ideas	downside	8,100	0	
Keyword Ideas	financial advice	6,600	0.63	10.21
Keyword Ideas	futureadvisor	6,600	0.15	1.9
Keyword Ideas	wisebanyan	4,400	0	0.06
Keyword Ideas	robo investing	2,400	0.6	8.78
Keyword Ideas	betterment investing	1,600	0.44	2.85
Keyword Ideas	robo adviser	880	0.31	3.65
Keyword Ideas	roboadvisor	880	0.24	6.73
Keyword Ideas	betterment returns	880	0.25	7.55
Keyword Ideas	online financial advisor	880	0.69	13.65
Keyword Ideas	robo etf	590	0.15	5.95
Keyword Ideas	futureadvisor review	590	0.31	4.08
Keyword Ideas	finance advice	590	0.54	9.23
Keyword Ideas	financial advisory firms	590	0.4	23.5
Keyword Ideas	roboadvisors	480	0.23	13.28
Keyword Ideas	advisory firm	480	0.15	7.19
Keyword Ideas	savvy investor	480	0.04	0.86
Keyword Ideas	flexscore	480	0.01	
Keyword Ideas	digital advisor	390	0.01	
Keyword Ideas	on the downside	390	0	
Keyword Ideas	how much do financial advisors cost	390	0.67	19.86
Keyword Ideas	betterment tax loss harvesting	320	0.01	
Keyword Ideas	advisors meaning	320	0	
Keyword Ideas	betterment portfolio	320	0.18	7.28
Keyword Ideas	betterment aum	320	0.05	3.85
Keyword Ideas	robo stock	320	0.13	9.58
Keyword Ideas	online financial advice	320	0.56	9.06
Keyword Ideas	shareowner online	260	0.01	
Keyword Ideas	nestwealth	260	0.19	1.23
Keyword Ideas	the downside	260	0	
Keyword Ideas	advisory world	260	0.02	
Keyword Ideas	advisor one	210	0.19	0.76
Keyword Ideas	betterment competitors	210	0.23	5.69

Keyword recommendation

SERPs for robo-advisors show FutureAdvisor ranking above the competition, along with industry category names. Other main competitors for this keyword are Sigfig, WiseBanyan, and Betterment for long tail keywords.

This represents an opportunity to ramp up SEO ratings through social media, paid search and outsourced content driving traffic to jemstep.com as a way to increase SE visibility.

Source: Google Keyword Planner. Search worldwide, past 12 months.

SEO Analysis

Highest-ranking keywords: Jemstep

term	full_url	Local Monthly Search volume	Global Monthly search volume
invesco investment	jemstep.com	20	40
advisor pro	jemstep.com	20	30
blue marble investments	riastatic.jemstep.com/advisorpro/earthfolio/bluemarble_adv2a__2b_20150813_final_asg.pdf	20	20
advisor solution	jemstep.com	10	10
portfolio manager online	jemstep.com	10	20
wealth management software providers	jemstep.com	10	30
fund manager advisor	jemstep.com	10	20
adviser agreement	pm.jemstep.com/about/adviser_agreement	10	10
investment adviser agreement	pm.jemstep.com/about/adviser_agreement	10	10

Keyword Analysis on SpyFu shows organic keywords ranking much lower than other competitors' keywords (see Betterment, FutureAdvisor on next slides).

Source: Spyfu

SEO Analysis

Highest-ranking keywords: FutureAdvisor

term	full_url	Local Monthly Search volume	Global Monthly search volume
best way to invest money	futureadvisor.com/content/resources/getting-started/how-to-invest/50k-dollars	4,400	6,600
short term investments	futureadvisor.com/content/resources/getting-started/portfolio-strategy/long-term-vs-short-term-investing	2,900	4,400
advisor.fidelity	futureadvisor.com/content/what-we-do/faq	2,400	2,400
advisor fidelity	futureadvisor.com/content/what-we-do/faq	2,400	2,400
best short term investments	futureadvisor.com/content/resources/getting-started/how-to-invest/20k-dollars	1,600	2,400
free financial advice	futureadvisor.com	590	1,900
best place to invest money	futureadvisor.com/content/resources/getting-started/how-to-invest/50k-dollars	880	1,900
financial online advisor	futureadvisor.com	0	1,450
best way to invest	futureadvisor.com/content/resources/getting-started/how-to-invest/50k-dollars	480	880
online financial advisor	futureadvisor.com	590	720
advisor online	futureadvisor.com	90	590
free financial advisor	futureadvisor.com	390	590
online financial planning	futureadvisor.com	320	590
online financial planner	futureadvisor.com	320	480
advisor com	futureadvisor.com/signin	260	480

FutureAdvisor and Betterment show not only the highest volume in industry-relevant organic keywords, but also an important presence of high-ranking keywords on their Resources page (see green highlight), something already considered on our Taxonomy plan.

Main keywords to work with:

- Robo advisor
- Robo advisors
- Financial online advisor
- Online financial advisor
- Advisor online
- Free financial advisor
- Online financial planning
- Online financial planner
- Advisor com

Source: Spyfu

SEO Analysis

Highest-ranking keywords: Betterment

term	full_url	Local Monthly Search volume	Global Monthly search volume
what is an etf	betterment.com/resources/investment-strategy/etfs/five-ways-an-etf-portfolio-serves-you-better	4,400	5,400
financial plan	betterment.com/resources/personal-finance/goals-and-advice/is-your-year-end-financial-plan-missing-something	1,900	5,400
short term investments	betterment.com/resources/personal-finance/goals-and-advice/short-term-investing-savings-account-alternative	2,900	4,400
investment strategies	betterment.com/resources/topics/investment-strategy	1,900	3,600
how to start investing	betterment.com/resources/investment-strategy/strategy-investing-in-your-20s	2,400	3,600
what is etf	betterment.com/resources/investment-strategy/etfs/five-ways-an-etf-portfolio-serves-you-better	1,900	3,600
online investing	betterment.com	1,900	2,900
best ways to invest money	betterment.com/resources/investment-strategy/strategy-investing-in-your-20s	1,900	2,900
how to invest in shares	betterment.com/resources/investment-strategy/fractional-shares-diversification-portfolio-investing	90	2,400
what is an index fund	betterment.com/resources/investment-strategy/index-fund-portfolios-win	1,900	2,400
investment manager	betterment.com/resources/inside-betterment/compare-investment-management-fees	590	2,400
online investment	betterment.com	390	1,900
investment strategy	betterment.com/resources/topics/investment-strategy	590	1,900
better investing	betterment.com	1,600	1,600
financial online advisor	betterment.com	0	1,450
investing online	betterment.com	320	720
betterment.com	betterment.com	590	720
online financial advisor	betterment.com	590	720
investment websites	betterment.com	480	720
passive investing	betterment.com/resources/tags/passive-investing	390	720

FutureAdvisor and Betterment show not only the highest volume in industry-relevant organic keywords, but also an important presence of high-ranking keywords on their Resources page (see green highlight), something already considered on our Taxonomy plan.

Main keywords to work with:

- Robo advisor
- Robo advisors
- Online investing
- Better investing
- Financial online advisor
- Investing online
- Online financial advisor
- Investment websites
- Passive investing

Source: Spyfu

SEO/Media analysis
Featured media outlets

Jemstep by Invesco	**N/A**
FutureAdvisor	Mintlife, CNN Money, WSJ
Betterment	Fox Business, WSJ, TechCrunch, Forbes, Investment News, CNN Money, The New York Times, Bloomberg
NESTEGG	InvestmentNews, RIA Biz, CNBC, Markets Media, ThinkAdvisor, PAM, etc.
trizic	N/A
Financial Guard	N/A

SEO/Media analysis
Backlink sources

Backlink Domain	Domain Strength	Domain Monthly Organic Clicks
fortune.com	59	10,000,000
cnbc.com	65	10,000,000
qz.com	59	10,000,000
investopedia.com	65	10,000,000
cnet.com	64	10,000,000
finance.yahoo.com	73	10,000,000
businessinsider.com	63	10,000,000
github.com	67	10,000,000
pcmag.com	62	10,000,000
huffingtonpost.com	64	10,000,000
marketwatch.com	62	10,000,000
money.cnn.com	67	10,000,000
huffingtonpost.com	64	10,000,000
reuters.com	64	10,000,000
techcrunch.com	58	10,000,000
fool.com	59	10,000,000
theguardian.com	67	10,000,000
blogs.wsj.com	66	10,000,000
marketwatch.com	62	10,000,000
wsj.com	66	10,000,000
time.com	59	7,500,000
twocents.lifehacker.com	59	6,500,000
lifehacker.com	59	6,500,000
wired.com	57	5,400,000
usnews.com	61	5,200,000
slate.com	55	2,900,000
money.stackexchange.com	59	2,900,000
bankrate.com	59	2,600,000
barrons.com	53	2,600,000
recode.net	51	2,500,000
makeuseof.com	56	1,800,000
thrillist.com	54	1,200,000
blog.ycombinator.com	51	810,000

Media is very diversified

The most important media outlets in the industry are popular domain names with 60+ domain authority and 10+ million organic clicks per month, driving not only awareness but also backlinks to the main industry players.

These are by rule of thumb the brands that support the highest-ranking robo-advisors such as Betterment and FutureAdvisor.

Source: SpyFu