

SAMPLE REPORT — AI SEARCH VISIBILITY AUDIT

Acme Wealth Advisors

Acme Wealth Advisors earned an **AI Visibility Grade of B · Above Average (59.0/100)** — appearing in the top three positions whenever ChatGPT and Perplexity cited the firm. The work ahead is volume: converting quality placement into consistent, cross-platform reach.

SPECIALTY FOCUS

3

Core client segments

TEAM SIZE

6

Advisory professionals

LOCATION

1

Columbus, OH

AI MENTION RATE

5.4%

9 of 166 query executions

NATIONAL LEADERBOARD

Not Listed

Of 9,482 firms

Strong Placement, Room to Scale

This audit ran Acme Wealth Advisors against 166 query executions across ChatGPT, Claude, Gemini, and Perplexity in August 2026, testing queries tied to the firm's three specialties — retirement income planning, business exit planning, and equity compensation — as well as Columbus-area financial advisor searches. The headline finding: Acme appeared in 9 of those 166 executions (a 5.4% mention rate), but when it did appear, it landed near the front of AI-generated responses.

ChatGPT was the most reliable source of visibility, naming the firm in 5 of 58 queries at an average position of 2.4 — consistently near the top of responses. Perplexity was similarly favorable, surfacing Acme in 3 of 20 queries at an average position of 3.3. Claude returned a single citation (limited data, position not meaningful to average). Gemini returned zero mentions across all 40 queries it was tested on — a concrete gap the firm can address.

AI platforms described Acme with accurate, differentiated language — fee-only, fiduciary, retirement income, business-exit focused — which reflects a clear brand signal in the content that does exist. The limiting factor is third-party corroboration: with backlinks from only 41 referring domains and no large volume of indexed client reviews, AI models lack the external citations needed to surface the firm more broadly, particularly on Gemini and Claude.

NATIONAL STANDING

Acme Wealth Advisors is **not currently listed on the national AI visibility leaderboard** among the 9,482 firms scored — an honest reflection of the current mention volume rather than a judgment on the firm's quality, and a gap that is addressable with the right content and authority signals.

AI VISIBILITY GRADE

B

ABOVE AVERAGE

59 / 100

REACH	D	5.4% mention rate
POSITION	A	avg position 3.1 when mentioned
BREADTH	B	3 of 4 platforms
AUTHORITY	B	0.4 sentiment (mostly positive)

Where AI Mentions Acme — and Where It Doesn't

Acme's AI visibility is concentrated on two platforms, absent on one, and barely registered on a third — a distribution that points to specific, fixable gaps rather than a broad credibility problem.

Perplexity

QUIET · 15.0%



QUERIES MENTIONING YOU	MENTION RATE	AVG POSITION
3 / 20	15.0%	3.3
Perplexity cited Acme in 3 of 20 queries at an average position of 3.3, making it the second-most productive platform in this audit. Perplexity's real-time web retrieval gives the firm's growing organic traffic a direct path to additional mentions as new content is published.		

ChatGPT

QUIET · 8.6%



QUERIES MENTIONING YOU	MENTION RATE	AVG POSITION
5 / 58	8.6%	2.4
ChatGPT is Acme's strongest platform, naming the firm in 5 of 58 queries at an average position of 2.4. That placement — consistently near the top of responses — reflects well-structured website content that ChatGPT's retrieval layer is already indexing and favoring for Columbus-area retirement and exit-planning queries.		

Claude

QUIET · 2.1%



QUERIES MENTIONING YOU	MENTION RATE	AVG POSITION
1 / 48	2.1%	6.0
Claude returned a single citation across 48 queries — limited data, so no meaningful position can be drawn from it. Claude's retrieval favors firms with dense third-party citation networks; the current 41-domain backlink profile likely explains the near-absence here.		

Gemini

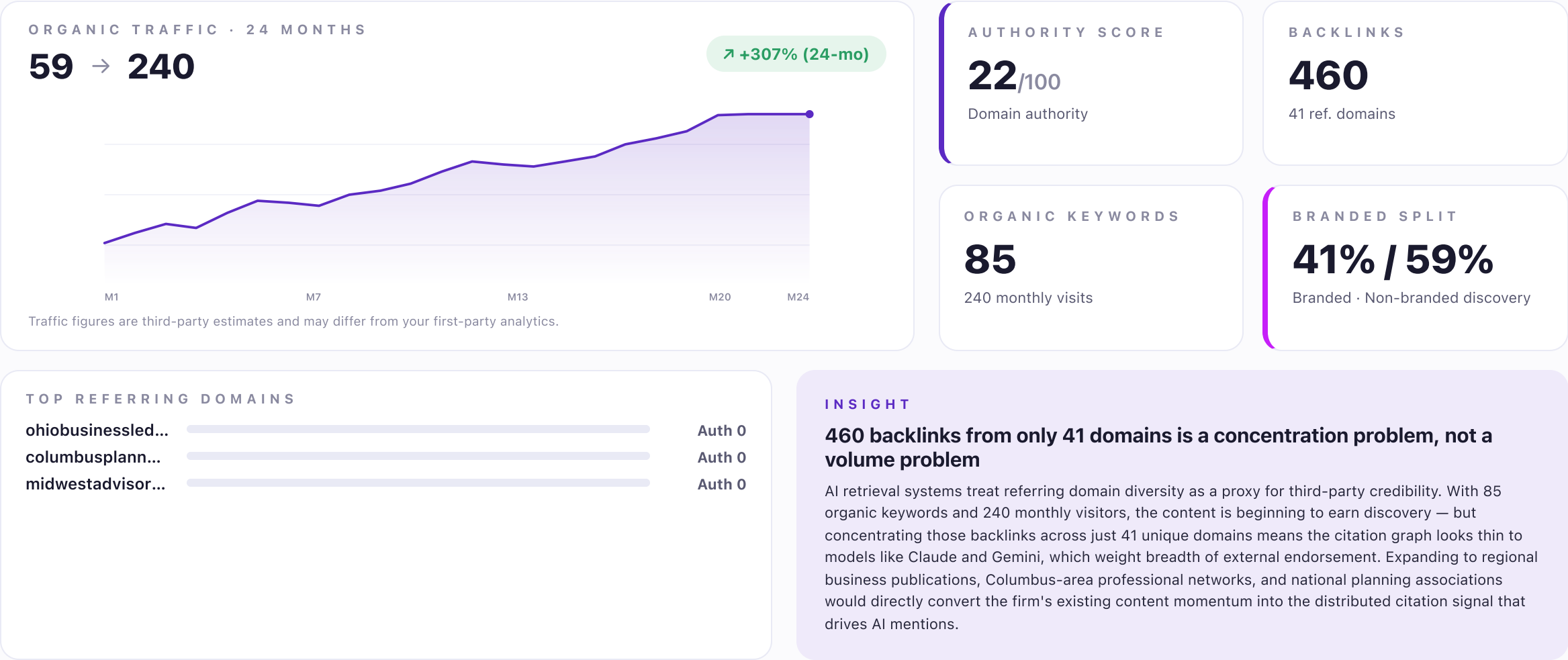
NO MENTIONS · 0 / 40



QUERIES MENTIONING YOU	MENTION RATE	AVG POSITION
0 / 40	0.0%	—
Gemini returned zero mentions across all 40 queries tested — the clearest single gap in this audit. Gemini weights Google Business Profile signals heavily; an incomplete or thin GBP for the Columbus office is the most likely culprit and the fastest lever to pull.		

A Growing Foundation, Still Early

Acme's web presence shows genuine momentum in organic search, but the underlying authority signals haven't yet caught up to the traffic gains — and those authority signals are exactly what AI platforms use to decide which firms to cite.



Who AI Mentions Alongside Acme

The firms listed below appeared in the same tailored query set run for this audit — queries built around Acme's specialties, service lines, and Columbus geography. This is not a general market ranking; it reflects which firms AI platforms co-surface when answering questions that are directly relevant to Acme's prospective clients. Raw mention counts reflect total times each firm was named across all query executions — one AI response can name a firm more than once, so mention counts and query-hit rates are different numbers.

• TAILORED CONTEXT • NOT A RANKING

TOP 7 FIRMS BY MENTION COUNT • 166 QUERY EXECUTIONS
MARKETS TESTED • COLUMBUS

			MENTIONS	AVG POS
#1	Stonebriar Meridian Wealth		28	#4.8
#2	Cobalt Harbor Capital		24	#5.0
#3	Northgate Private Wealth		17	#4.5
#4	Fairfield Harbor Financial Group		14	#3.9
#5	Ironvale Legacy Planning		12	#4.8
#6	Silver Maple Wealth Co.		11	#3.1
#7	Acme Wealth Advisors		9	#3.1

"Mentions" counts every time a firm is named across the query set — a single AI answer often names a firm more than once. Acme Wealth Advisors was named 9 times across 9 of 166 query executions (5.4% mention rate).

NATIONAL AI VISIBILITY LEADERBOARD

APPLES-TO-APPLES

Not Listed

Of 9,482 firms scored. Same query set — 64 U.S. metros representing 150M+ Americans, 4 AI providers — run against every firm. **This is your apples-to-apples rank.**

WHY THIS MATTERS

Acme's 9 mentions trail Stonebriar Meridian Wealth's 28

Acme Wealth Advisors is not currently listed on the national AI visibility leaderboard among the 9,482 firms scored — an honest starting point, not a ceiling.

How AI Describes Acme

Across the platforms that cited Acme, the descriptors were consistent and accurate — a sign that the firm's positioning is coming through in its public-facing content. The one flag worth noting is the absence of robust third-party review signals, which AI models read as a corroboration gap.



DESCRIPTORS AI USED (CHATGPT · PERPLEXITY · CLAUDE)

FEE-ONLY

FIDUCIARY

PLANNING-LED

RETIREMENT INCOME FOCUS

BUSINESS-EXIT PLANNING

LIMITED THIRD-PARTY REVIEWS

Five of six descriptors reflect exactly how Acme wants to be perceived — fee-only, fiduciary, and specialty-specific. The sixth, “limited third-party reviews,” is the outlier: AI platforms surfaced it as a caveat, which can create hesitation for a prospective client reading an AI-generated response about the firm.

“Acme Wealth Advisors — Columbus-based fee-only fiduciary focused on retirement income and business exits.”

— CHATGPT

“I don't find a large volume of third-party client reviews for a firm called 'Acme Wealth Advisors.'”

— CLAUDE

Where Acme Isn't Showing Up — Yet

Four query categories that are directly relevant to Acme's prospective clients are returning little to no mention of the firm — each one tied to a specific content or authority gap that is addressable.



Gemini: Zero Mentions Across 40 Queries

CRITICAL

Gemini returned no citations for Acme across all 40 queries in this audit — the only platform to produce a complete zero.



Business Exit and Equity Comp Queries Return Competitors

CRITICAL

Queries around RSU vesting strategies, ESPP tax treatment, stock option timing, and business sale liquidity planning are high-intent searches where Acme's specialty should be a differentiator — but without published, indexed content on these topics, AI models have no citable source to reference the firm.



Retirement Transition Queries: Competitors Fill the Gap

HIGH

Pre-retirees searching AI platforms for guidance on Social Security timing, Medicare enrollment, or portfolio decumulation strategies are Acme's core prospective clients — yet the firm does not appear to be earning mentions in those query categories.



Claude: Near-Absent Due to Thin Citation Network

MODERATE

Claude returned a single citation across 48 queries — limited data, but consistent with a known pattern: Claude's retrieval weights firms that are mentioned and linked across a broad, authoritative external web.



ChatGPT Already Recognizes the Specialty — That's the Starting Point

An average ChatGPT position of 2.4 across 5 citations means the firm's core positioning — Columbus-based, fee-only, retirement income, business exits — is already landing with the platform that accounts for the largest share of AI search traffic.

The Specific Moves That Will Shift the Numbers

QUICK WINS · 30–60 DAYS

01 Complete and Activate the Columbus Google Business Profile

Gemini returned zero mentions across 40 queries — the most direct path to changing that is a fully built-out GBP for the Columbus office, including specialty categories (“retirement income planning,” “business exit planning”), regular posts, and a structured process for generating indexed client reviews.

02 Publish a Business Exit Planning Pillar Page Targeting Ohio Business Owners

The keyword “business exit financial planning” is already in Acme's non-branded traffic — a pillar page covering liquidity event tax planning, QSBS exclusions, earnout structures, and post-sale wealth management would give ChatGPT and Perplexity a citable, authoritative source to reference for the high-intent queries that Stonebriar Meridian Wealth is currently dominating with its 28-mention lead.

03 Launch an Equity Compensation Content Cluster

RSU vesting, ESPP tax treatment, and concentrated position management are technically specific topics with no close substitutes — and Acme's specialty makes it a credible author.

04 Target 8–10 New Referring Domains from Columbus-Area and Ohio Business Publications

The current 41-domain backlink profile is the primary reason Claude is near-silent and Gemini is absent.

STRATEGIC MOVES · 3–6 MONTHS

01 Build a Three-Segment Content Authority Program — One Cluster per Specialty

Pre-retirees, business owners approaching a sale, and equity-compensated professionals each deserve their own pillar page, supporting article cluster, and FAQ resource written for conversational AI queries.

02 Execute a Digital PR Program to Build the Citation Network Claude Requires

Claude's near-absence (one citation across 48 queries) is directly tied to the breadth of the firm's external citation network, not its quality.

03 Implement Financial Service Schema and Run Quarterly AI Visibility Checks

Adding LocalBusiness, FinancialService, and FAQPage schema markup to the Columbus office page and specialty content gives AI parsing layers structured data to work with — directly improving how ChatGPT and Gemini represent the firm's service offerings.

COMING SOON

Introducing AdvisorFinder Intelligence

This report is a single moment in time. **AdvisorFinder Intelligence** — our AI-visibility platform for advisory firms, launching soon — turns this one-time audit into an always-on system: track how ChatGPT, Claude, Gemini, and Perplexity surface your firm over time, benchmark against the peers you actually compete with, and act on the specific moves that get you named in the answers your future clients are already asking.

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