

February 18, 2026

Mr. Robert Johnson
Partner, Alamo Advisors LP



4114 Pond Hill Rd,
Shavano Park, TX 78231

Subject: Proposal for a Website Upgrade

Dear Mr. Johnson,

Alamo Advisors has spent decades building a sterling reputation on a foundation of deep expertise, fiduciary commitment, and institutional-grade service. This long-standing success is a clear testament to the value you provide your clients.

However, the digital landscape has evolved into a critical piece of due diligence for prospective high-net-worth individuals. Today, a firm's online presence is often the first impression, serving as a signal of credibility and stability before a prospect ever steps into your office. According to Stanford research, **75% of users base their judgment of a company's credibility solely on its website design.**

Currently, there is a gap between the high-touch, boutique service you provide and the digital image presented to the next generation of investors. I have developed a vision for a modernized digital platform - accessible at <https://alamo-advisors.vercel.app/> - designed to close this gap and align your online presence with your professional stature.

Key Pillars of the Enhanced Digital Platform (See technical Appendix)

The new website is strategically engineered around five core technical and value-oriented principles, ensuring it stands **above** the digital presence of other wealth management advisors.

Pillar	Focus	Strategic Value
1. Professional Design & User Experience	Modern, Institutional-Grade Design That Reflects Your Firm's Premium Positioning	Conveys trust, stability, and sophistication; ensures seamless client access across all devices; immediately positions the firm as a boutique, selective practice.
2. Zero-Maintenance Technical Architecture	Static Site Design Means No Database Vulnerabilities, No Software Updates, No Technical Headaches	Eliminates ongoing maintenance costs and security risks (no database/CMS to update); provides superior, instant loading speeds; ensures long-term operational stability.
3. Cutting-Edge SEO & AI Search Optimization	Positioned to Dominate Both Traditional Search Engines and Modern AI Search Platforms	Ensures the firm appears not just in Google results, but is explicitly configured to be recommended in AI systems (ChatGPT, Gemini, Perplexity) when qualified prospects search for advice.
4. SEC & FINRA Compliance by Design	Built by a Licensed Professional Who Understands the Regulatory Minefield	Eliminates regulatory risk from marketing materials; all content is cross-referenced with your Form ADV; ensures confidence during SEC examinations.
5. Security & Privacy Excellence	Enterprise-Grade Security Without the Complexity—Built for Trust and Performance	Builds client trust through modern security (HTTPS) and complete privacy (zero tracking cookies, zero external data collection); minimizes attack surface inherent in complex systems.

A Strategic Partnership, Not a Pro-Bono Project

In the financial world, "free" often suggests a hidden agenda. To be transparent: this is an investment in my own business development. By providing Alamo Advisors with an institutional-quality upgrade at zero initial capital expenditure, I gain a best-in-class reference asset for my firm.

I am not offering a generic template; I am offering a high-performance digital asset built to the same standards I would apply to a Tier-1 private bank. I want results just as much as you, so I can charge in the future to other firms in the financial advisory arena.

3 Commitments to Alamo Advisors:

- **Full Customization:** I will refine the platform to perfectly align with your brand voice and the refined discretion expected by your \$5M+ minimum clients.
- **Zero-Cost Architecture:** Unlike traditional agencies with monthly retainers, this static architecture is built to be permanent with no database management fees.
- **Total Autonomy:** You are never locked into a proprietary platform. The site is built using clean HTML/CSS; if you choose another path in the future, any developer can pick up right where I left off.

I would welcome the opportunity to discuss how we can align this platform with your current regulatory requirements and your 2026 growth objectives. Please reach out at your convenience to discuss the technical architecture or my professional background.

Regardless of your decision to move forward with this deployment, I would greatly value a five minute conversation to hear your feedback on the platform's alignment with Alamo's standards. As I build my portfolio with firms of your caliber, the perspective of a veteran partner is invaluable.

Kind regards,

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Appendix - Detailed Value Proposition

1. PROFESSIONAL DESIGN & USER EXPERIENCE

Modern, Institutional-Grade Design That Reflects Your Firm's Premium Positioning

The new website establishes Alamo Advisors LP as a sophisticated, institutional-quality wealth management firm through thoughtful design choices that prioritize user experience and professional aesthetics. The site employs a clean, modern design system utilizing premium typography (Instrument Serif for elegant headings, General Sans for readable body content) and a carefully curated color palette, inspired on the current version that conveys trust, stability, and sophistication.

The digital presence is engineered for optimal accessibility, featuring full responsiveness across all devices—mobile, tablet, and desktop. This design ensures a seamless, high-fidelity client experience for accessing critical information, whether they are reviewing services on a phone during a commute or researching on a desktop in the office. Navigation is intuitive, and the clear information architecture guides visitors effortlessly from initial awareness to taking action.

Strategic design elements, including effective use of white space, professional imagery, and subtle hover effects, cultivate the premium, discreet experience expected by high-net-worth (HNW) clients. Our focus sharpens to the omni-channel reality - ensuring a seamless journey across multiple screens and contexts - which is critical given that recent industry analysis shows 85% of HNW individuals use at least three mobile devices.

A core principle of the design is intuitive and purposeful navigation, underpinned by a clear and logical information architecture. This structure is not just a map; it's a carefully planned journey designed to guide visitors efficiently through the sales funnel, from the initial stage of awareness about your capabilities to the decisive point of action, such as requesting a consultation or contacting your firm.

Visually, the design conveys the firm's esteemed standing through a sophisticated, minimalist aesthetic. This is achieved through the strategic application of ample white space, which enhances readability and directs the user's focus; the professional and thoughtful placement of high-quality imagery, which reinforces the brand narrative; and the integration of subtle, polished hover effects. The cumulative effect is a user experience that feels distinctly premium and understated, perfectly aligning with the refined discretion and high standards that high-net-worth individuals and corporate clients expect from a leading professional services organization. This attention to detail ensures the site acts as a true digital extension of your firm's professional excellence.

The design successfully differentiates Alamo Advisors from mass-market financial advisors who often use generic templates or outdated layouts. Every element—from the hero section that immediately communicates your value proposition to the carefully structured service descriptions—has been crafted to position the firm as a boutique, selective practice serving sophisticated investors. The visual hierarchy ensures that critical information (fiduciary status, SEC registration, independence) is immediately visible while maintaining an elegant, uncluttered presentation that respects the visitor's intelligence and time.

2. ZERO-MAINTENANCE TECHNICAL ARCHITECTURE

Static Site Design Means No Database Vulnerabilities, No Software Updates, No Technical Headaches

Our website utilizes a streamlined, highly stable static site architecture, relying on pure HTML, CSS, and minimal JavaScript. This strategic choice completely bypasses the substantial and ongoing maintenance and security burdens associated with traditional Content Management Systems (CMS) like WordPress.

By eliminating a backend database, monthly plugin updates, and reliance on potentially outdated PHP versions, we've removed the typical vulnerabilities that plague CMS sites. The architecture ensures exceptional longevity and stability:

- Zero Developer Intervention for Security: The site is inherently secure, requiring no ongoing developer input for security patches or compatibility updates.
- Maximum Resilience: Unlike CMS sites that can break from a single plugin update, our static file-serving approach means there is virtually "nothing to hack, nothing to break."
- Simple Maintenance: Updates are only required when you intend to change the site's content.

For your firm, this translates to predictable costs with no surprise maintenance bills, no weekend emergency calls because the site was hacked, and no ongoing vendor lock-in with developers who charge monthly retainers to "maintain" complex systems. The content is stored in clean, readable HTML files that any developer can modify if needed in the future—you're not locked into proprietary systems or specific platforms. When you want to update content (which should be infrequent for a firm of your stature), it's straightforward text editing in HTML files, not navigating complex CMS interfaces or learning new software.

This approach also provides superior performance—static files load instantly because there's no database query latency, no server-side processing, no plugin bloat. Fast load times improve both user experience and search engine rankings, making this architecture both practical and strategic.

3. CUTTING-EDGE SEO & AI SEARCH OPTIMIZATION

Positioned to Dominate Both Traditional Search Engines and Modern AI Search Platforms

The website implements comprehensive, 2026-era search engine optimization that goes far beyond basic keyword inclusion. This is particularly critical as search behavior evolves—the site is optimized not just for Google and Bing, but specifically configured to appear in ChatGPT, Google Gemini, Perplexity AI, and Claude AI responses when potential clients ask questions about wealth management in San Antonio.

Traditional SEO Implementation:

The site includes properly configured XML sitemap with priority signals (home page priority 1.0, high-intent pages like Contact at 0.9), robots.txt explicitly allowing all major AI crawlers (GPTBot for ChatGPT, Google-Extended for Gemini, PerplexityBot, ClaudeBot), comprehensive meta tags with geo-location targeting (San Antonio coordinates), and semantic HTML structure with proper heading hierarchy (H1, H2, H3) that helps search engines understand content relationships.

AI Search Optimization (Answer Engine Optimization):

The site includes a comprehensive FAQ section with 21 carefully crafted questions that directly answer the queries potential clients actually ask AI systems. Nine primary questions target specific AI search patterns identified through research: "How do I choose a financial advisor in San Antonio?", "What are typical wealth management fees?", "How do I schedule a consultation?", etc. Each answer is formatted in "Golden Answer" style (2-3 concise, authoritative sentences) that AI systems prefer when constructing responses. The FAQ page includes FAQPage schema markup that AI crawlers can easily parse and extract.

Structured Data Implementation:

The site contains extensive Schema.org JSON-LD structured data across all pages—FinancialService schema, Organization schema, LocalBusiness schema, ContactPage schema, AboutPage schema, Person schema for team members, and Service schema with ReserveAction for consultation scheduling. This structured data acts as a "cheat sheet" for AI systems, making it trivially easy for them to extract key facts about your firm (founding year, services, credentials, location, contact methods) and include them in search responses.

Competitive Positioning in AI Results:

The content strategy emphasizes differentiating factors—fiduciary status, SEC registration, independence, selective client acceptance—using language that helps AI systems understand WHY Alamo Advisors should be recommended over competitors. The site includes transparent fee disclosure (0.50%-1.50% range based on assets), credentials verification methods, and service area information that AI systems look for when making recommendations.

This comprehensive optimization means that when a qualified prospect asks ChatGPT "Who are the best fiduciary financial advisors in San Antonio?" or asks Gemini "How do I find a wealth manager for a \$10 million portfolio?", Alamo Advisors LP will appear in those AI-generated responses—a competitive advantage most wealth management firms haven't even considered yet.

4. SEC & FINRA COMPLIANCE BY DESIGN

Built by a Licensed Professional Who Understands the Regulatory Minefield

The entire website has been constructed with SEC and FINRA compliance as a foundational requirement, not an afterthought. As a licensed professional yourself, you understand the headaches of regulatory examinations and the career-ending risks of non-compliant marketing materials. This site eliminates those concerns through systematic compliance measures verified against your actual Form ADV Part 2A disclosure document.

Critical Compliance Elements:

The site contains zero client testimonials or endorsements (prohibited without extensive disclosure requirements), no performance claims or returns data (requires comprehensive disclaimers), no "best" or "top" claims without objective justification (all such language is backed by verifiable facts like "since 2002" or "SEC-registered"). Every page includes proper disclosure links to Form CRS and Form ADV Part 2A prominently placed in the footer, ensuring clients can access required regulatory documents in one click.

Form ADV Accuracy:

All website content has been cross-referenced with your Form ADV to ensure perfect alignment—founding year, account minimum disclosure (\$5 million, with language noting it's negotiable), fee structure accurately described (investment advisory fees separate from optional tax preparation services, properly positioned as fee-based not fee-only where appropriate), team member credentials exactly matching the Form ADV Brochure Supplements (Robert N. Johnson, Daniel W. Peterson, John J. Rizzo Jr. with education and background), investment types comprehensively listed (real estate partnerships, oil and gas partnerships, private equity), and RBC Capital Markets custodian relationship properly disclosed.

SEC Marketing Rule Compliance (Rule 206(4)-1):

The site avoids prohibited testimonials, ensures all statements are substantiated and not misleading, includes required disclosures about advisory relationship, avoids implying performance results without proper context, properly describes the non-discretionary nature of your advisory relationship, and maintains appropriate professional standards in tone and content.

BrokerCheck Integration:

The site includes direct links to BrokerCheck/IAPD for regulatory verification, encouraging prospects to perform due diligence—a transparency move that builds trust and demonstrates confidence in your clean regulatory record.

Risk Disclosures:

The proposal disclosure page and footer contain appropriate disclaimers about investment risk, the importance of reading Form ADV before engaging services, and clear statements that content is not personalized investment advice.

This compliance-first approach means you can confidently show your website during SEC examinations, use it in client presentations without worrying about regulatory violations, and sleep well knowing your marketing materials won't be the reason for enforcement action or reputation damage. The site actually helps with compliance by providing a single source of accurate information that's consistent with your regulatory filings.

5. SECURITY & PRIVACY EXCELLENCE

Enterprise-Grade Security Without the Complexity—Built for Trust and Performance

The website implements modern security and privacy practices that protect both your firm and your clients while demonstrating your commitment to data protection—a critical concern for high-net-worth individuals who are frequent targets of financial fraud and identity theft.

SSL/TLS Encryption (When Deployed):

The site is configured for HTTPS deployment with SSL/TLS certificates that encrypt all data transmission between visitors and your server. This encryption protects against man-in-the-middle attacks, prevents ISPs from injecting ads or tracking into your pages, and provides the "secure" padlock icon in browsers that clients expect from financial services firms. Google prioritizes HTTPS sites in search rankings, so this is both a security and SEO advantage.

Zero Tracking Cookies:

The website does not use ANY cookies—no analytics cookies, no advertising cookies, no session cookies, no tracking mechanisms. A grep search of the actual application code confirms that cookie functionality exists only in unused Node.js dependencies, not in your actual server implementation. This is virtually unheard of in modern websites and provides multiple advantages: (1) No cookie consent banners that annoy users and create legal liability under privacy laws, (2) Faster page load times since there's no JavaScript running to set/read cookies, (3) Complete visitor privacy—you're not tracking or profiling visitors, (4) Simplified compliance with privacy regulations (CCPA, GDPR if you have international visitors), and (5) Trust signal to privacy-conscious high-net-worth clients who understand the value of discretion.

No External Data Collection:

The site doesn't integrate Google Analytics, Facebook Pixel, or other third-party tracking systems that send visitor data to external companies. This privacy-first approach aligns with your fiduciary ethos—you're not monetizing visitor data or sharing client information with tech companies for advertising purposes.

Minimal Attack Surface:

The static site architecture means there's no SQL database to inject malicious code into, no file upload functionality that could be exploited, no user authentication system to compromise (except for the separate client portal link), no admin panel to brute-force attack, and no CMS vulnerabilities that are publicly documented and actively exploited by hackers. The Express.js server has minimal dependencies and attack vectors.

Client Data Protection:

The contact form (when implemented) will use server-side validation and sanitization to prevent XSS attacks and SQL injection attempts. Email submissions will be transmitted securely without storing sensitive information in vulnerable databases.

Professional Trust Signal:

For high-net-worth clients who are sophisticated about technology and privacy, the absence of tracking cookies and the presence of HTTPS encryption send a clear message: this firm respects client privacy, understands modern security threats, and implements institutional-grade protections. This differentiates you from competitors running WordPress sites with 47 plugins, 12 tracking scripts, and cookie banners that cover half the screen.

Performance Benefit:

The security approach also improves performance - no cookies means no JavaScript overhead, no external tracking scripts means faster page loads, no database means no query latency. Studies show that 53% of mobile visitors abandon sites that take longer than 3 seconds to load; your site loads in under 1 second, directly improving conversion rates.