Jay M/Kyle H website workthru

January 07, 2026 2:45PM

Attendees:

J James **Owner** K Kyle Harrison

Generic Meeting Note

Jay M/Kyle H Website Workthrough *(Detailed discussion on migrating the firm's website, scheduling tools, domain management, and forms automation)*

Discussion:

1. **Initial Context and Attendee Introductions** James Madden and Kyle Harrison confer about updating the High Ridge Advisory website. James is a financial advisor targeting both ultra-high-net-worth clients and individuals with smaller budgets. They discuss possible approaches to accommodate different client segments and compliance considerations.

2. **Current Setup and Costs** They review James's existing Squarespace platform (annual cost of $276) and Acuity scheduling tool (another $192/year). They contemplate switching from Acuity to another scheduling tool like TidyCal, which could be a one-time lifetime cost ranging from $29 to $79 depending on the deal. Additionally, James is considering whether to continue subscribing to Precise FP at $90/month or find alternative form solutions.

3. **Client Intake and Onboarding Forms** James has built a Google Form for client intake but wants more customization and branding. They discuss possibly embedding Google Forms for immediate use and then later swapping in the more professional Precise FP or another vendor. They also address security, compliance, and the desire to ensure forms are hosted on a secure platform (e.g., Precise FP or Google) rather than on the public website.

4. **Website Development and Customization** Kyle demonstrates a modern approach using Netlify and GitHub to build and maintain a custom-coded site integrated seamlessly with AI tools like Claude or ChatGPT. This setup can facilitate advanced website features (dynamic content, analytics, and embedded forms). James is open to a more robust, custom-coded framework if it can be managed without downtime or confusion compared to Squarespace.

5. **Domain Settings and Transfers** James grants Kyle domain manager permissions in Squarespace, so Kyle can manage DNS settings for future hosting transfers. They note that

everything can remain on Squarespace during the development phase, and then once James approves, they will redirect the site from Squarespace to Netlify.

6. **Scheduling Integration** They discuss embedding a scheduling calendar within the new site so that clients see available times (synced in real time with James's existing calendars). The TidyCal platform can integrate multiple calendars (work, personal, etc.). This would remove the need to maintain separate time slots or revert to manual blocking.

7. **Dynamic Content and Compliance** James expresses interest in real-time website updates, such as featuring current market data or news. They explore ways to integrate pre-approved dynamic data—possibly from YCharts or other compliance-approved vendors. They acknowledge the importance of routing all material through compliance officer Michael. They also consider automated AI "agents" that might submit updates to compliance for approval.

8. **Mailing List and Automated Campaigns** Kyle describes how an email marketing tool can automate newsletters or onboard new leads after they fill out an online form. They consider connecting sign-ups or booking confirmations to an email sequence that highlights James's services and educational content.

9. **High-Net-Worth vs. Entry-Level Client Experience** James wants tailored sections on the new website for both high-net-worth individuals and more general budgeting clients. They envision a segmented design—where a flowchart or series of questions could direct visitors to subscription-based planning or advanced wealth management services under the "family wealth" umbrella.

10. **Next Steps and Logistics** They conclude by confirming that Kyle will keep building a non-public, "draft" version of the site on Netlify and push code to GitHub. James has set up accounts on Netlify and GitHub so that both can collaborate. Once functional elements are approved, they will finalize domain pointing and gradually retire the old Squarespace site.

To Dos:

1. (James) Share full login credentials or relevant permissions for Squarespace so Kyle can manage domain/DNS.

2. (James) Finalize Google Form edits or alternative form approach; decide on Precise FP once timeline or cost becomes clear.

3. (Kyle) Continue building the new site in a Netlify workspace and integrate code with GitHub.

4. (James) Explore TidyCal or alternative scheduling tools and confirm replacement for Acuity.

5. (Kyle) Investigate compliance-approved options for dynamic content (e.g., YCharts) and confirm risk/compliance with Michael.

6. (James) Outline website sections to distinguish high-net-worth services versus subscription/budget services.

7. (Kyle) Embed a secure client portal link and ensure it seamlessly redirects to third-party (e.g., Crystal Capital, relevant wealth platforms).

8. (James) Consider setting up an automated email marketing tool (e.g., MailerLite) for segmenting new leads.