

# Tewksbury Financial Advocacy Website Case Study

## Project Overview

A comprehensive website redesign for Tewksbury Financial Advocacy, aimed at improving their online presence and client engagement capabilities.

## Client Background

Tewksbury Financial Advocacy is a financial advisory firm specializing in personal and business financial planning, retirement strategies, and investment management.

## Challenge

The client needed a professional website that would:

- Establish credibility in the financial services sector
- Clearly communicate their services to potential clients
- Enable potential clients to easily schedule consultations
- Meet compliance requirements for financial services websites

## Solution

- Created a clean, professional design that reflects trust and expertise
- Implemented a color scheme aligned with financial sector expectations
- Developed a responsive layout for optimal viewing on all devices
- Incorporated clear calls-to-action throughout the site

## Technical Implementation

- Built with TaxDome's CMS (Content Management System) for modern browser compatibility
- Used Figma to create designs and gather feedback from client
- Pointed the client's domain from GoDaddy to TaxDome.
- Ensured HTTPS security for the site

## Key Features

### 1. **\*\*Index Page\*\***

- Detailed descriptions of financial services
- Interactive calculators for financial planning
- About Me section for the client

### 2. **\*\*Contact System\*\***

- Multi-step consultation booking form
- Secure contact forms
- Integration with client management system

### 3. **\*\*Information Page\*\***

- Information on client's business processes

## Technical Specifications

- **Frontend**: TaxDome (A WordPress Branchoff)
- **Backend**: PHP 8.1
- **Server**: TaxDome package hosted
- **Security**: SSL/TLS encryption
- **Accessibility**: WCAG 2.1 AA compliant

## Lessons Learned

1. **Early Stakeholder Involvement**
  - Regular client feedback sessions proved crucial
  - Iterative design approach allowed for timely adjustments
2. **TaxDome Learning Process**
  - Had to learn the TaxDome CMS interface before building
  - Security measures need to exceed standard practices
3. **Content Strategy**
  - Professional copywriting investment was valuable
  - SEO optimization from the start paid dividends

## Future Improvements

- Implementation of client portal
- Integration with CRM system
- Addition of live chat feature
- Enhanced analytics tracking
- Testimonials Section
- Regular content updates strategy

## Conclusion

The Tewksbury Financial Advocacy website project successfully delivered a professional, functional, and secure online presence that meets both client and user needs. The implementation of modern web technologies and focus on user experience has resulted in measurable improvements in client engagement and lead generation.