



Digital Marketing Report

Impressions

How many ads were served:

5,548

Clicks

Times a user clicked on an ad

309

Click-Through Rate

$(\text{Clicks}/\text{Impressions}) \times 100$

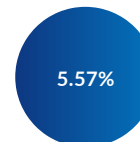
5.57%

Your Product Breakout by Impressions



PPC

Total Engagement Rate



$(\text{Clicks} + \text{View-throughs}) / \text{Impressions} \times 100^*$

X the National Average



X the National Avg (.07%)

**Note: CTR and Total Engagement Rate do not include impressions or view-throughs from CTV, YouTube, or PMax campaigns. For TikTok campaigns, Total Engagement Rate includes both Click Conversions and View-throughs due to differences in Conversion tracking.*



Spend Performance

Does not include management fee

PPC Ad Cost

Amount spent on the campaign

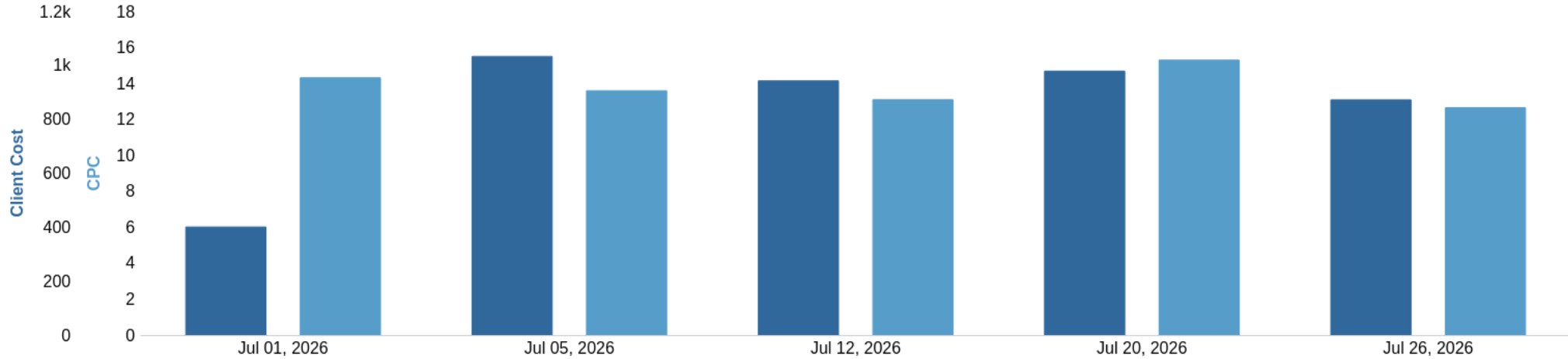
4,227.42

PPC Cost-Per-Click

Cost/Clicks

13.68

Week by Week Spend Performance





Line Item Performance

Line Item Name	Impressions ↓	Clicks	CTR	X the National Avg (.07%)
Core Wealth Management - Financial Planning PPC	1,824	82	4.50%	64.22
Core Wealth Management - Retirement Planning PPC	1,730	87	5.03%	71.84
Core Wealth Management - CFP PPC	1,468	78	5.31%	75.91
Core Wealth Management - Fee-Only PPC	497	57	11.47%	163.84
Core Wealth Management - NAPFA PPC	29	5	17.24%	246.31



PPC Cost per Line Item

Ad Group	Impressions	Clicks ↓	CTR	Cost	Avg. CPC
Core Wealth Management - Retirement Planning PPC	1,730	87	5.03%	1,057.02	12.15
Core Wealth Management - Financial Planning PPC	1,824	82	4.50%	968.02	11.81
Core Wealth Management - CFP PPC	1,468	78	5.31%	1,027.88	13.18
Core Wealth Management - Fee-Only PPC	497	57	11.47%	1,044.12	18.32
Core Wealth Management - NAPFA PPC	29	5	17.24%	130.39	26.08

Cost: Amount Spent on the PPC campaign. You are charged when a Click occurs on an ad.

Avg. CPC: The amount paid for your Ads divided by your total Clicks.

Note: Costs do not include management fee

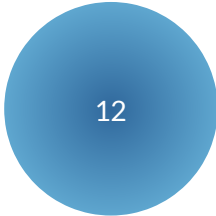


Total PPC Conversions



Times users clicked on an ad leading to your website and visited a page or completed an action

Phone Calls



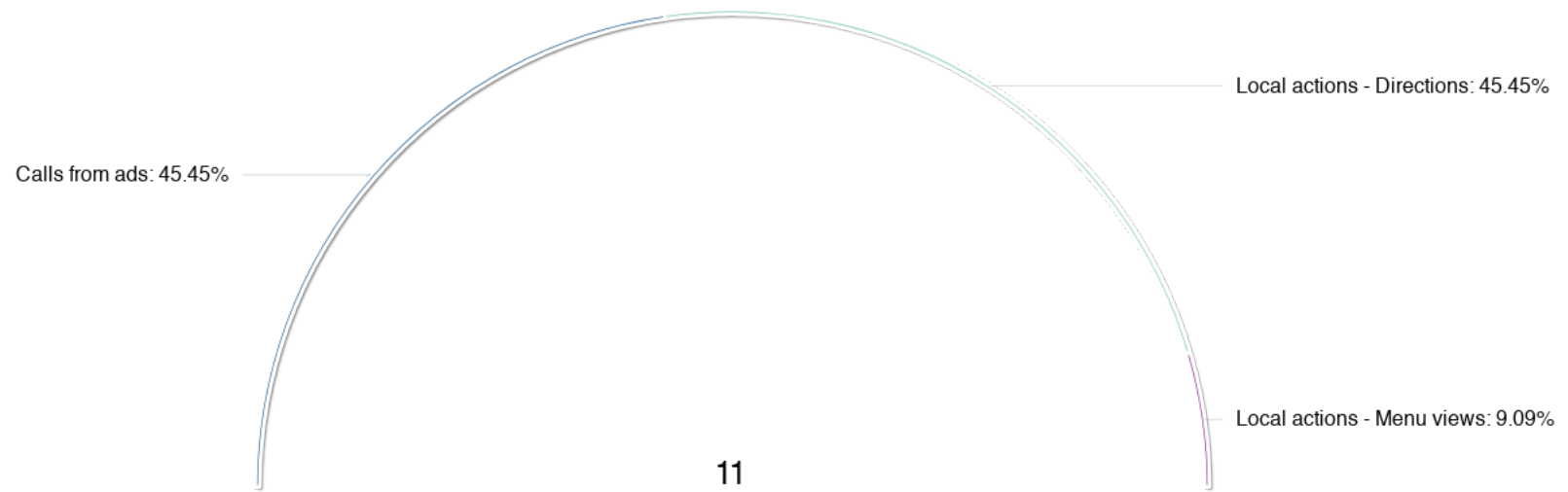
Times users clicked on the phone number on your ad and completed a call

PPC Conversion Performance

Conversion Action Name	Total Conversions ↓
Form Fills	9



PPC Other Google Conversions - these are automatic conversions Google tracks based on actions taken from your ads



"Calls from ads" refers to a qualified conversion, meaning that the call had to go through and last for at least 60 seconds for it to be counted.



Grid contains more rows, but they have been clipped.

PPC Creative Performance

Ad Preview	Impressions	Clicks ↓	CTR	Cost	Avg. CPC
Fee-Only Retirement Planners Holistic Retirement Planning {LOCATION(City):Florida} Retirement Planning Personalized Retirement Plans Expert Retirement Planners Free Second Opinion Today Fee-Only & Fiduciary Advisor Have You Saved Enough Money? Enough Money For Retirement? Retirement Is A Big Step Let Us Help You - Call Today Preparing For Retirement? Retirement Planning Services Building Toward Retirement Certified Financial Planners https://www.core-wm.com/personalized-retirement-guidance/ We will help address the emotional and financial issues that retirement planning brings., We're flexible & transparent. Contact us for a complimentary intro meeting today., We Offer Expert Solutions to Protect & Grow Your Wealth - Call Us Today!, Meeting Your Unique Needs is Our Priority. We Help Grow & Protect Your Wealth!	1,730	87	5.03%	1,057.02	12.15
CFP® Professional Fiduciary Serving {LOCATION(City):Jupiter}, Florida Fiduciary CFP Professional Achieve Your Life's Goals Putting Your Interests First Plan for Today and Tomorrow Core Wealth Management Comprehensive Financial Plans Personalized Financial Plans Easy-to-understand Solutions Take Control of Your Finances Financial Planning in {LOCATION(City):Jupiter} https://www.core-wm.com/comprehensive-financial-planning-to-help-you-achieve-your-lifes-goals/ Helping you grow, protect, & manage your wealth through life's challenges & opportunities., Offering trusted, experienced guidance to help you make informed decisions., Contact us to schedule a complimentary introductory meeting., Acting with honesty, integrity, and diligence as NAPFA advisors.	1,824	82	4.50%	968.02	11.81
CFP® Professional Fiduciary Comprehensive Financial Plans CFP® in {LOCATION(City):Jupiter} CFP® Professionals Tax and CFP® Professionals Fiduciary CFP® Professionals Fee-only CFP® Professionals CFP® Financial Planning CFP® {LOCATION(City):Florida} Certified Financial Planners https://www.core-wm.com/certified-financial-planner/ Tax and CFP® professionals providing personalized, integrated financial strategies., Tax and CFP® professionals serving our community for over 20 years., Simplified, coordinated financial advice for taxes, investments, and retirement.	1,468	78	5.31%	1,027.88	13.18
Fee-Only Fiduciary Advisor Putting Your Interests First Fiduciary CFP® Professionals Fee-Only NAPFA Members Fee-Only Financial Advisors Unbiased Financial Advice Fee-Only CFP® Professionals Plan Your Financial Future Personalized Financial Plans Transparent Fee Structures Trusted Financial Advisors Clear, Flexible Fee Structures Fee-Only Retirement Planning Independent Fee-Only Advisors {LOCATION(City)} Fiduciaries https://www.core-wm.com/fee-only-financial-advisors/ Personalized wealth, retirement and tax strategies from fee-only CFP® professionals., Committed to providing personalized wealth and financial advice for {LOCATION(City)}, {LOCATION(City)} Fee-only NAPFA members. Start your financial journey with confidence., Get personalized, fee-only fiduciary advice from trusted NAPFA financial planners.	497	57	11.47%	1,044.12	18.32
NAPFA Financial Advisors Fee-Only NAPFA Advisors Find a NAPFA Advisor Today Trusted NAPFA Advisors NAPFA Fiduciary Advisors Flat-Fee NAPFA Advisors Independent NAPFA Planner Work With a NAPFA Member Core Wealth Management No Commissions. Just Advice. NAPFA Certified Planners NAPFA Wealth Planning Help Unbiased NAPFA Advisors Transparent NAPFA Advice NAPFA Registered Advisors	29	5	17.24%	130.39	26.08

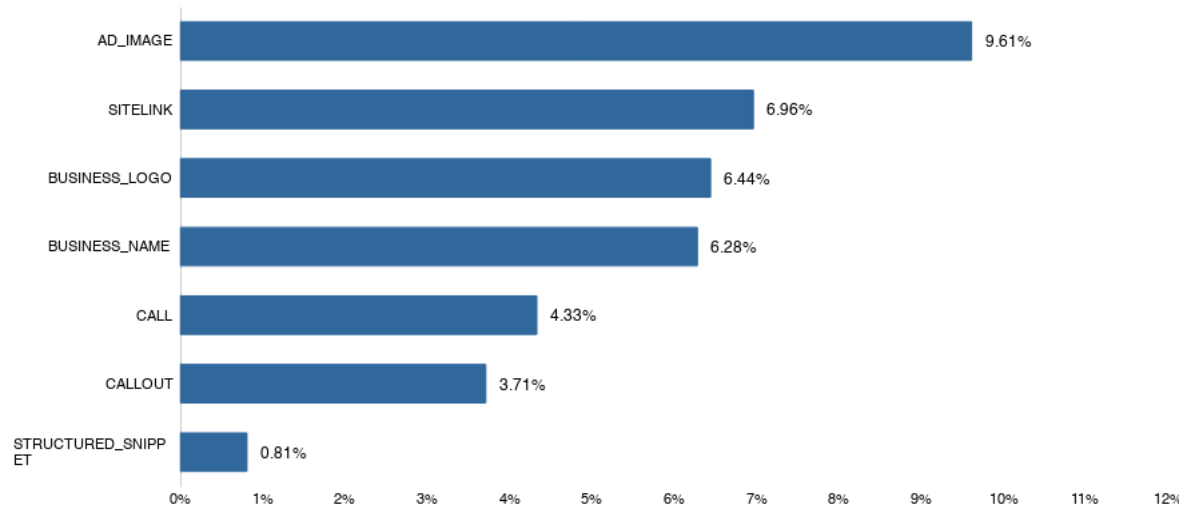


Top 5 Extension Performance

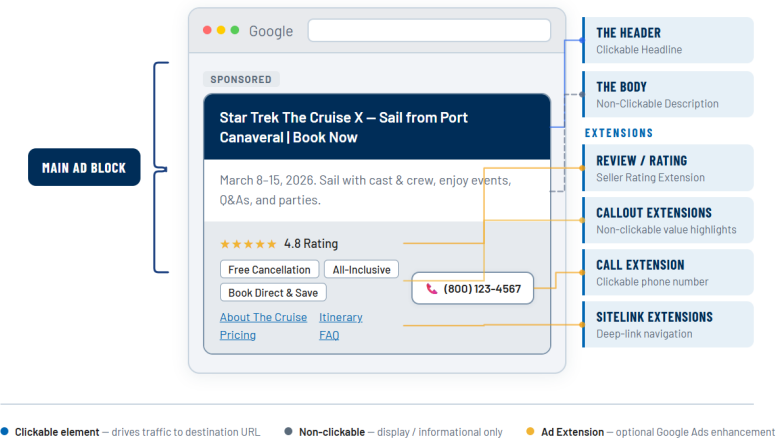
Extension Type	Extension	Impressions	Clicks ↓	CTR	Cost	Avg. CPC
BUSINESS_NAME	Core Wealth Management	4,487	282	6.28%	4,044.70	14.34
BUSINESS_LOGO	Social media image - 2025-03-21 11:30:03.383 (8), https://tpc.googlesyndication.com/simgad/7031757231679672494	1,904	122	6.41%	1,786.05	14.64
BUSINESS_LOGO	https://tpc.googlesyndication.com/simgad/18295005522667250952	1,775	115	6.48%	1,689.48	14.69
CALL	561-491-0231	2,099	90	4.29%	1,250.40	13.89
SITELINK	Comprehensive Fee-Only Advice, Low Cost, Tax Efficient Solutions, Wealth Management	912	68	7.46%	786.91	11.57

Because a single ad can display multiple extensions at the same time, this data overlaps. As a result, the combined metrics (Impressions, Clicks, CTR, Cost, & Avg. CPC) for all extensions will appear much higher than the actual overall campaign totals.

PPC Extension Type Performance



CTR

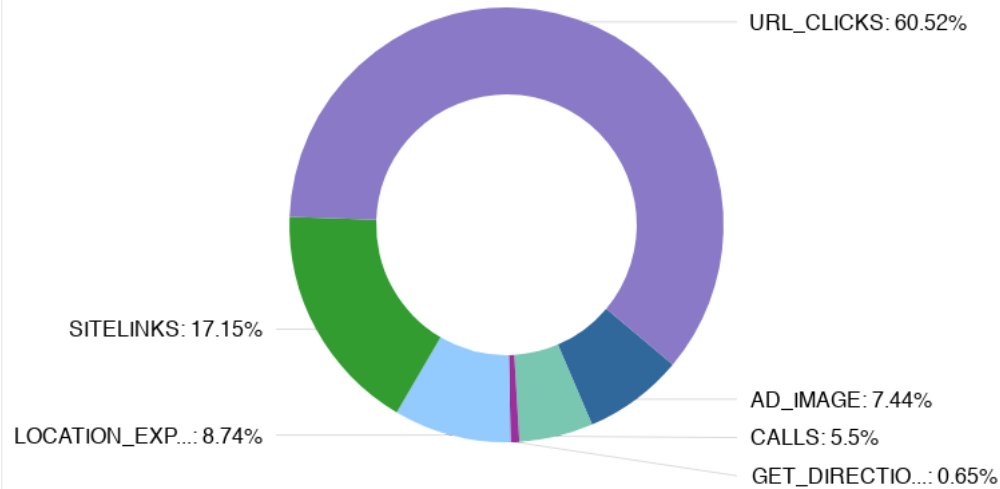


This report shows many times an ad was clicked that contained that extension, not how many people clicked on that specific extension itself.

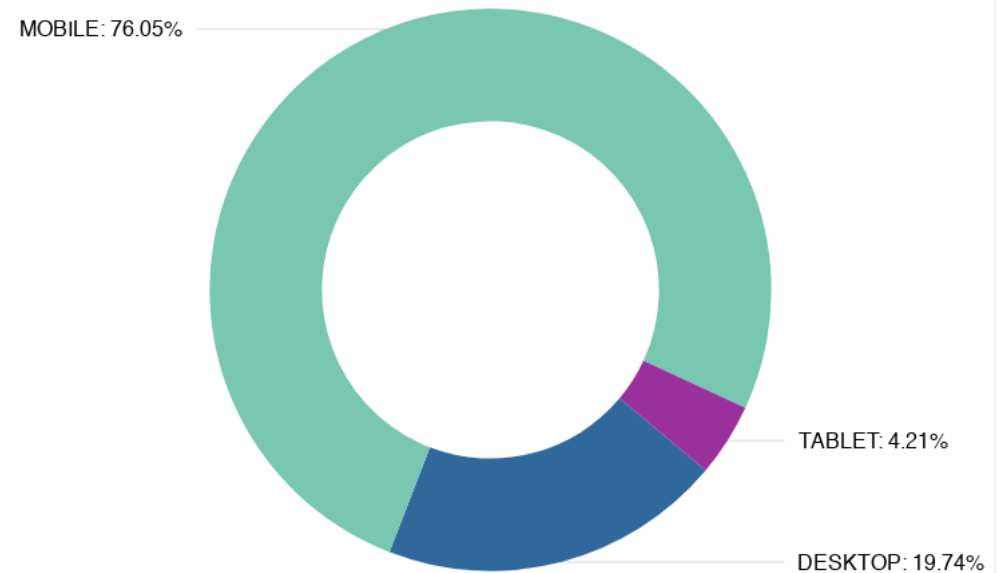
Location Extensions are not currently available to be shown.



Click Type Performance



Device Performance



URL Click: When users click on the final URL in an ad.

Headline Click: Clicks on the ad's main headline, which also leads users to the main landing page.

Sitelink Click: When a user clicks on one of the sitelink extensions that links then directly to a specific page on your site.

Get Location Details Click: When a user clicks in to expand the client's location in the Maps section of the search results list.

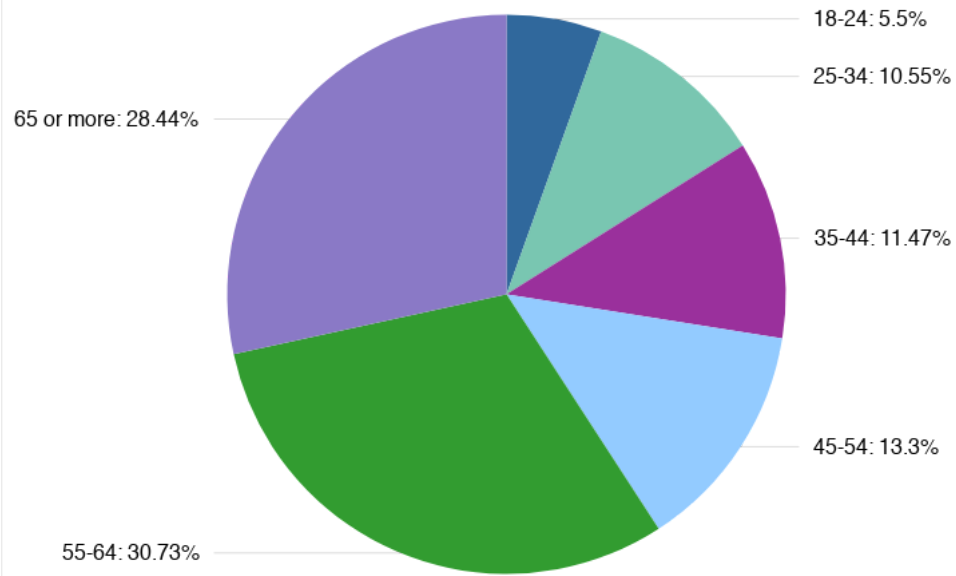
Phone Calls Click: When a user clicks to call your business (includes hang ups after the click - will be less than the completed calls reported in the Conversion section).

Driving Directions Click: When a user clicks on the "Get Directions" link within an ad.

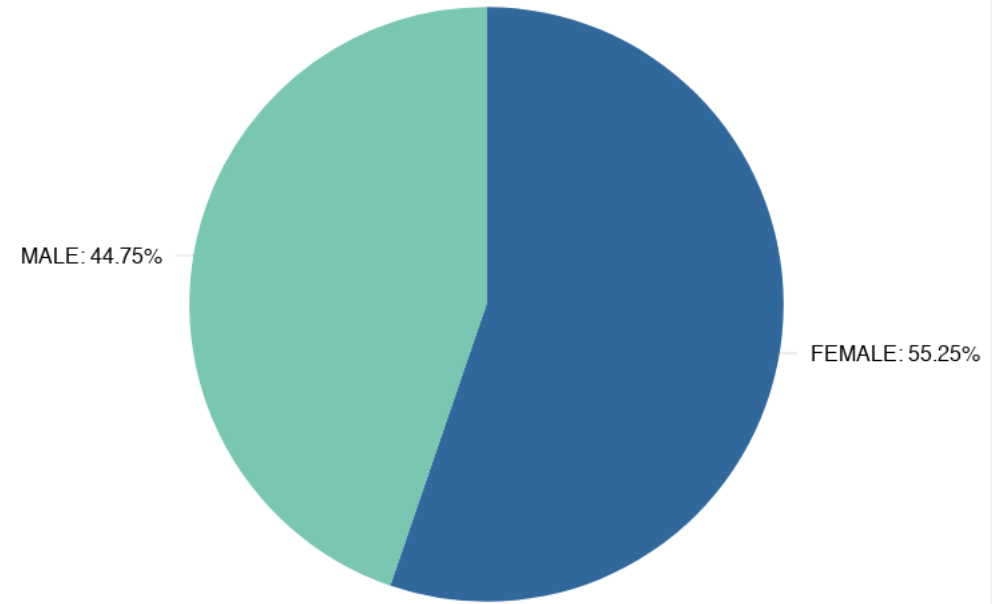
Location Expansion: Clicks on ads shown to users near or interested in locations similar to those targeted in the campaign.



Click Engagement by Age



Click Engagement by Gender





Grid contains more rows, but they have been clipped.

Top Search Term Performance

Search Term	Ad Group	Impressions	Clicks ↓	CTR	Cost	Avg. CPC
napfa	Core Wealth Management - NAPFA PPC	17	4	23.53%	100.39	25.10
cfp	Core Wealth Management - CFP PPC	49	3	6.12%	17.16	5.72
financial advisor palm beach gardens	Core Wealth Management - Financial Planning PPC	9	3	33.33%	69.55	23.18
facet fee structure	Core Wealth Management - Fee-Only PPC	2	2	100.00%	20.79	10.40
financial advisor	Core Wealth Management - Financial Planning PPC	48	2	4.17%	30.97	15.49
financial advisor near me	Core Wealth Management - CFP PPC	8	2	25.00%	80.83	40.42
financial advisor port st lucie	Core Wealth Management - CFP PPC	10	2	20.00%	41.38	20.69
workplace schwab	Core Wealth Management - Financial Planning PPC	3	2	66.67%	22.56	11.28
4 1 k plan	Core Wealth Management - Financial Planning PPC	4	1	25.00%	12.74	12.74
401 k	Core Wealth Management - Retirement Planning PPC	13	1	7.69%	9.24	9.24
401k	Core Wealth Management - Retirement Planning PPC	55	1	1.82%	26.71	26.71
403b plan	Core Wealth Management - Retirement Planning PPC	1	1	100.00%	7.47	7.47
41k number	Core Wealth Management - Retirement Planning PPC	1	1	100.00%	44.46	44.46
adam gusky east asset management	Core Wealth Management - Financial Planning PPC	2	1	50.00%	13.51	13.51
angela dunn financial advisor	Core Wealth Management - Retirement Planning PPC	2	1	50.00%	4.05	4.05
annuity gator	Core Wealth Management - Financial Planning PPC	2	1	50.00%	11.87	11.87



Grid contains more rows, but they have been clipped.

Call Reporting Details

Ad Group	Start Time ↑	End Time	Duration (seconds)	Status	Call Tracking DisplayLocation	Caller Area Code	Call Type	Calls Count
Core Wealth Management - Retirement Planning PPC	Jul 01, 2026 12:58 PM	Jul 01, 2026 1:01 PM	200	RECEIVED	AD	561	HIGH_END_MOBILE_SEARCH	1
Core Wealth Management - Financial Planning PPC	Jul 02, 2026 12:28 PM	Jul 02, 2026 12:29 PM	61	RECEIVED	AD	561	HIGH_END_MOBILE_SEARCH	1
Core Wealth Management - Retirement Planning PPC	Jul 06, 2026 9:33 AM	Jul 06, 2026 9:34 AM	25	RECEIVED	AD	239	HIGH_END_MOBILE_SEARCH	1
Core Wealth Management - Retirement Planning PPC	Jul 08, 2026 5:46 PM	Jul 08, 2026 5:47 PM	69	RECEIVED	AD	914	HIGH_END_MOBILE_SEARCH	1
Core Wealth Management - CFP PPC	Jul 13, 2026 9:20 AM	Jul 13, 2026 9:20 AM	15	RECEIVED	AD	917	HIGH_END_MOBILE_SEARCH	1
Core Wealth Management - Financial Planning PPC	Jul 13, 2026 11:32 AM	Jul 13, 2026 11:33 AM	19	RECEIVED	AD	917	HIGH_END_MOBILE_SEARCH	1
Core Wealth Management - Retirement Planning PPC	Jul 15, 2026 12:41 PM	Jul 15, 2026 12:41 PM	17	RECEIVED	LANDING_PAGE	305	HIGH_END_MOBILE_SEARCH	1
Core Wealth Management - Financial Planning	Jul 16, 2026 11:05 AM	Jul 16, 2026 11:06 AM	34	RECEIVED	AD	504	HIGH_END_MOBILE_SEARCH	1

"Calls Count" is the number of times people clicked on a phone number displayed in an ad on a mobile device or manually dialed the Google forwarding number displayed in an ad on any device, regardless of the duration.



Google Analytics 4 Performance

14,653	12,152	2,183	17.96%	11,994	11,694	12,030
VIEWS	SESSIONS	ENGAGED SESSIONS	ENGAGEMENT RATE	ACTIVE USERS	NEW USERS	TOTAL USERS
		1.01	26:35:29			
		SESSIONS PER USER	TOTAL USER ENGAGEMENT			

Views: The number of mobile app screens or web pages your users saw. Repeated views of a single screen or page are counted.

Sessions: The number of sessions that began on your website or application. A session is a period of time during which a user interacts with your website or app.

Engaged Sessions: The number of sessions that lasted 10 seconds or longer, or had 1 or more conversion events or 2 or more page or screen views.

Engagement Rate: Engaged Sessions / Total Sessions

Active Users: The number of distinct users who visited your website or application. An active user is any user who has an engaged session.

New Users: The number of new unique user IDs who interacted with your site or launched your app for the first time.

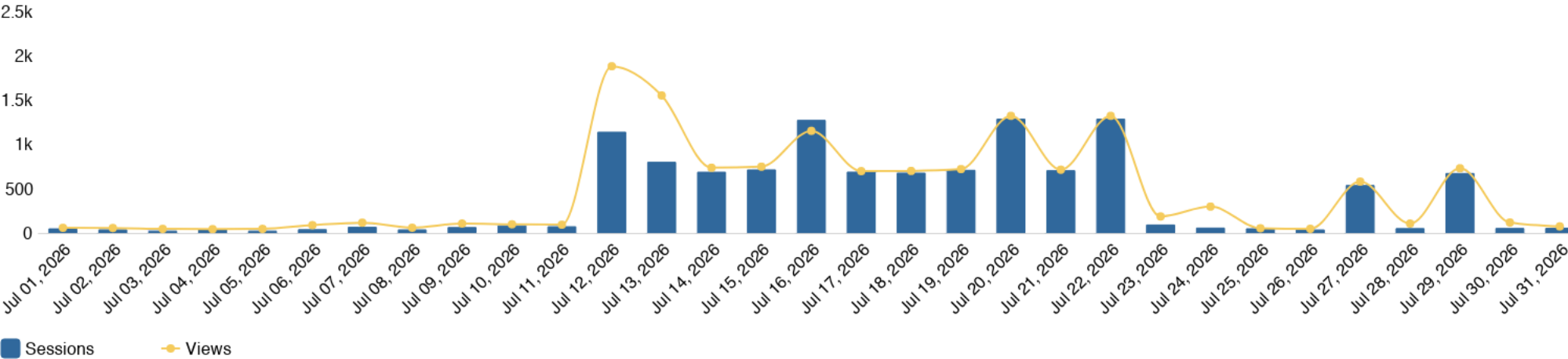
Total Users: The number of unique user IDs that triggered any events.

Sessions Per User: The average number of sessions per user.

Total User Engagement: The length of total time that your app screen was in the foreground or your web page was in focus.



Google Analytics 4 Performance by Day

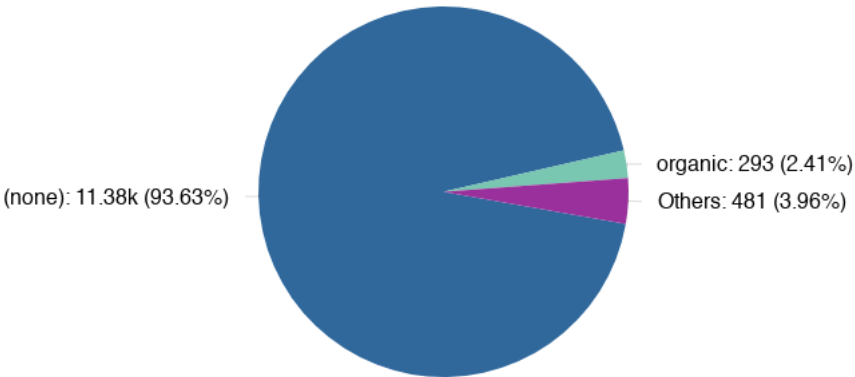


Google Analytics 4 Account Performance

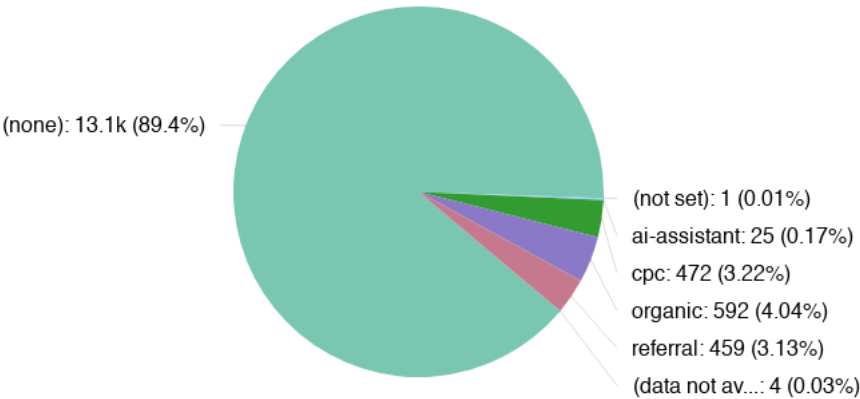
Analytics Account Name ↑	Sessions	Views	Total User Engagement	Pages / Session	Engagement rate
Total	12,152	14,653	26:35:29	1.21	17.96%
Core Wealth Management	12,152	14,653	26:35:29	1.21	17.96%



Google Analytics 4 Sessions by Medium



Google Analytics 4 Page Views by Medium

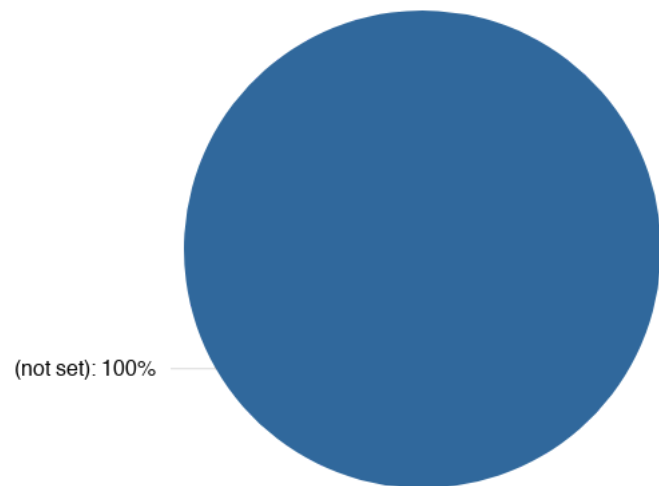


Google Analytics 4 Event Performance

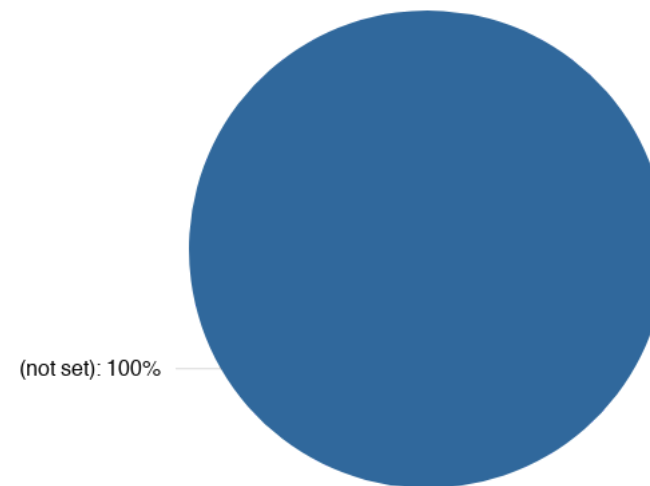
Event name	Event count ↓
Total	55,662
page_view	14,653
scroll	12,041
session_start	12,021
first_visit	11,694
user_engagement	4,689
click	462
file_download	89
view_search_results	13



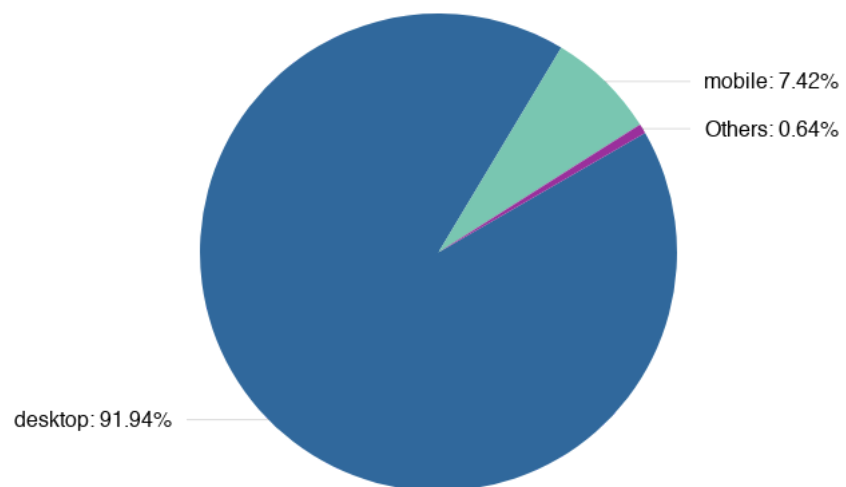
Google Analytics 4 Engaged Sessions by Gender



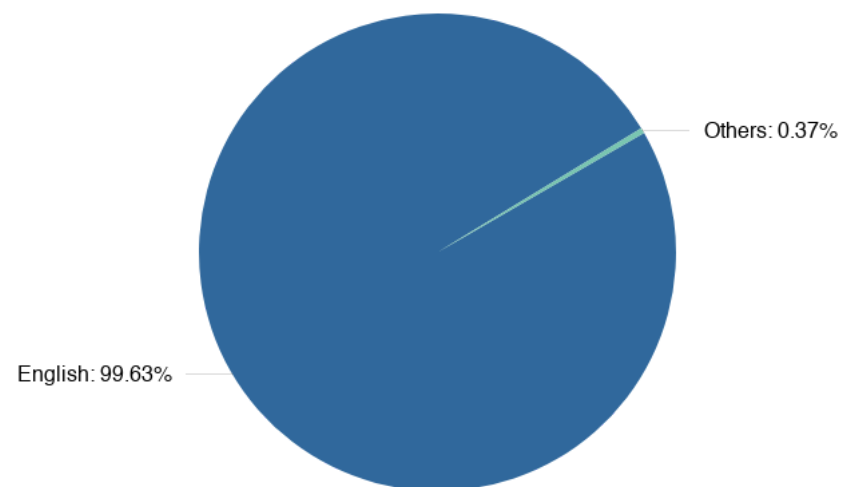
Google Analytics 4 Engaged Sessions by Age



Google Analytics 4 Engaged Sessions by Device



Google Analytics 4 Sessions by Language





Google Analytics 4 Top Browser Performance

Browser	Sessions ↓	Views	Engaged sessions	Engagement rate	Total User Engagement
Total	12,160	14,653	2,184	17.96%	26:35:29
Chrome	11,699	13,804	1,901	16.25%	20:27:35
Safari	301	519	176	58.47%	03:39:41
Edge	111	216	72	64.86%	01:23:34
Firefox	28	94	22	78.57%	01:02:04
Samsung Internet	11	10	10	90.91%	00:01:50

Google Analytics 4 Page Path Performance

Page path	Engaged sessions ↓
Total	3,039
/	327
/our-team/	118
/contact-us/	68
/todd-schanel-cfa-cpa-cfp/	56
/blog/	49
/services/	46
/certified-financial-planner/	45
/financial-planning/	44
/faq/	38
/about-us/	33



Google Analytics 4 Performance by Geo

City	Region	Sessions ↓	Views	Engaged sessions	Engagement rate	Total User Engagement
Total		12,188	14,653	2,210	18.13%	26:35:29
Boardman	Oregon	10,744	12,062	1,579	14.70%	13:08:40
Singapore	(not set)	250	250	3	1.20%	00:00:14
Miami	Florida	72	99	32	44.44%	00:49:14
Jupiter	Florida	54	150	33	61.11%	00:46:53
Palm Beach Gardens	Florida	39	87	25	64.10%	00:46:42
New York	New York	37	52	15	40.54%	00:13:18
Port St. Lucie	Florida	36	72	28	77.78%	00:25:42
(not set)	Florida	35	53	23	65.71%	00:11:03
(not set)	(not set)	33	33	1	3.03%	00:00:41
Kendall	Florida	25	72	14	56.00%	00:21:15
(not set)	(not set)	23	23	0	0.00%	00:00:04
West Palm Beach	Florida	23	36	17	73.91%	00:19:54
Wellington	Florida	21	50	12	57.14%	00:46:18
Delray Beach	Florida	18	41	9	50.00%	00:16:44
Hermosa Beach	California	18	221	12	66.67%	00:43:23



All available products in our *toolbox*.



Social Mirror



Mobile Conquesting



Connected TV



Meta



Website Visitor ID



TikTok



Search Engine Optimization



Performance Max



Digital Out-Of-Home



LinkedIn



Amazon Targeting



Live Chat



Google Pay-Per-Click



YouTube+



Native Ads



Online Audio



Display Ads



Video Ads



Geo-Framing

? Your account team is [here to help](#) - reach out with any questions or to explore new ideas.