

RIA Website Launch Checklist

Assign an accountable owner, record evidence, and make a documented pass/fail decision before the website becomes the firm's public production site.

Prepared by Allux Editorial Team Version date: July 20, 2026

This worksheet covers the website workstream. It does not replace the complete formation, registration, custody, employment-transition, cybersecurity, or legal work required for an RIA launch.

Launch control

Firm	Planned go-live
	mm/dd/yyyy
Launch owner	Website implementer
Designated reviewer	Domain and DNS owner
Form and data owner	Records owner
Final decision	Decision date and signer
GO / NO-GO	

1 Firm facts and content

- ☐ Approved firm identity and public-fact sheet completed.
- ☐ Legal and public-facing names verified.
- ☐ Registration-status and jurisdictional wording approved for the launch date.
- ☐ Services, target audience, fee descriptions, minimums, and geographic statements verified.
- ☐ Office address, phone, email, and hours verified.
- ☐ Team names, roles, credentials, biographies, and photos verified.
- ☐ Current public documents, disclosures, and regulatory links supplied by the appropriate owner.
- ☐ Page and URL inventory approved.
- ☐ Navigation and CTA destinations match each page's purpose.
- ☐ Placeholder, sample, and stale content removed from desktop, tablet, phone, footer, menu, modal, and reusable components.
- ☐ No invented testimonials, awards, people, customer data, or unsupported superlatives remain.
- ☐ Image and document sources, permissions, and licenses recorded.
- ☐ Downloadable documents are current, legible, and linked from approved locations.

Owner	Evidence	Result	Approver and date
		PASS / FAIL / N/A	

2 Domain, DNS, HTTPS, and email

- ☐ Firm-controlled registrar account confirmed.
- ☐ Registrar MFA, recovery method, renewal, and billing confirmed.
- ☐ Pre-change DNS inventory saved.
- ☐ Owner and purpose recorded for each production DNS record.
- ☐ Production root and www behavior confirmed.
- ☐ HTTPS certificate valid on every canonical hostname.
- ☐ Production mailboxes and aliases active.
- ☐ Website form, scheduling, CRM, and other legitimate senders inventoried.
- ☐ Applicable SPF, DKIM, and DMARC settings configured according to the firm's email-provider requirements.
- ☐ Direct test messages delivered.
- ☐ Every form notification delivered to the correct production destination.
- ☐ Recovery and escalation contact documented for registrar, DNS, hosting, and email.

Owner

Evidence

Result

PASS / FAIL / N/A

Approver and date

3 Reviewer, disclosures, and records

- ☐ Complete review packet contains all page copy, images, metadata, documents, and structured-data descriptions intended for publication.
- ☐ Material factual claims have current support.
- ☐ Testimonials, endorsements, ratings, awards, performance, or hypothetical results reviewed if used.
- ☐ Required disclosures and documents identified by the designated reviewer.
- ☐ If applicable, the current Form CRS is posted in the approved prominent and accessible location.
- ☐ Reviewer, review date, exceptions, and final approval recorded.
- ☐ Final approved copy saved separately from editable drafts.
- ☐ Final published version can be retained through the firm's designated records process.
- ☐ Evidence supporting material claims can be retrieved.
- ☐ Publication date, change log, and accountable publisher recorded.

Owner

Evidence

Result

PASS / FAIL / N/A

Approver and date

4 Visitor journey, forms, and accessibility

- ☐ Desktop and phone navigation tested outside the design canvas.
- ☐ Footer, menus, CTAs, phone links, email links, and external links tested.
- ☐ Headings, tables, cards, forms, consent controls, and error messages readable at common widths.
- ☐ Keyboard navigation and visible focus checked.
- ☐ Image alternatives, form labels, contrast, zoom behavior, and heading order reviewed.
- ☐ Every form passes valid submission, error-state, success-state, delivery, and ownership tests.
- ☐ Form data goes only to approved production destinations.
- ☐ Privacy wording and consent treatment match the implemented data path approved by the firm.
- ☐ Scheduler, client portal, login, and account-application transitions reach production destinations.
- ☐ Public PDFs and downloads open successfully on desktop and phone.
- ☐ No staging hostname, temporary share link, or draft document remains exposed.

Owner	Evidence	Result	Approver and date
		PASS / FAIL / N/A	

5 Search, entity, and measurement

- ☐ Every intended public page returns HTTP 200 over HTTPS.
- ☐ Permanent redirects and destination URLs match the approved migration map.
- ☐ Every indexable page has a self-referencing canonical.
- ☐ Meta robots and X-Robots-Tag directives match the indexation plan.
- ☐ robots.txt permits intended crawling and references the canonical sitemap.
- ☐ XML sitemap contains only canonical, indexable, successful URLs.
- ☐ Title, meta description, H1, Open Graph copy, and visible topic agree.
- ☐ Structured data is valid and matches visible, verified facts.
- ☐ Every person, review, rating, FAQ, business type, and other entity in structured data is supported by visible, verified information; no fictional or placeholder entities remain.
- ☐ Organization name, URL, logo, contact details, and any sameAs profiles are verified.
- ☐ Search Console production property is verified and the sitemap is ready.
- ☐ Principal CTA clicks, successful lead submissions, and account transitions can be observed without submitting a real customer lead.

Owner

Evidence

Result

PASS / FAIL / N/A

Approver and date

6 Cutover and post-launch checks

- ☐ Approved copy and configuration frozen.
- ☐ Pre-launch DNS and current-site recovery references saved.
- ☐ Reviewer approval and go-live owner reconfirmed.
- ☐ Production host published or connected in the planned sequence.
- ☐ Redirects and canonical URLs applied.
- ☐ Homepage, priority pages, navigation, HTTPS, forms, email, crawling and indexing controls, sitemap, and measurement checked on production.
- ☐ Launch evidence and defect log saved.
- ☐ Correction or rollback owner available.
- ☐ Old service or recovery path remains available until the receiving site and handoff pass acceptance, subject to the governing agreement.
- ☐ Public site rechecked after cutover.
- ☐ Next-business-day check completed.
- ☐ First-week check completed.

Owner

Evidence

Result

PASS / FAIL / N/A

Approver and date

Stop-the-launch review

Mark **NO-GO** if any unresolved item below is material to the launch.

- ☐ Registrar, DNS, production website, or email recovery is unavailable.
- ☐ Required reviewer approval is incomplete.
- ☐ A required current public document or disclosure is missing, stale, or inaccessible.
- ☐ A material claim lacks support.
- ☐ A form fails or sends data to an unapproved destination.
- ☐ HTTPS, redirect, canonical, crawling, or indexability settings are materially wrong.
- ☐ Staging URLs, fictional data, placeholder copy, or unsupported schema remain public.
- ☐ The firm cannot preserve the approved and published version.
- ☐ No accountable launch-day owner is available.

Open blocker 1

Open blocker 2

Open blocker 3

Launch decision

Complete Sections 1-5 before go-live. Record cutover and post-launch evidence in Section 6.

GATE	RESULT	ACCOUNTABLE OWNER	EVIDENCE LOCATION
FIRM FACTS AND CONTENT	PASS / FAIL / N/A		
DOMAIN AND EMAIL	PASS / FAIL / N/A		
REVIEWER AND RECORDS	PASS / FAIL / N/A		
VISITOR JOURNEY	PASS / FAIL / N/A		
SEARCH AND TECHNICAL GO-LIVE	PASS / FAIL / N/A		
Final decision	Signed by	Date and time	
GO / NO-GO			

Selected primary sources

- [SEC investment adviser marketing guide](#)
- [SEC Form CRS](#)
- [17 CFR 275.204-2](#)
- [ICANN registrant FAQs](#)
- [Google Search Central crawling and indexing](#)
- [ADA.gov web accessibility guidance](#)

Editorial note: This checklist provides general educational information and is not legal, regulatory, compliance, cybersecurity, accessibility, or tax advice. Requirements differ by registration status, services, state, affiliations, and implementation. Have the appropriate professionals review what applies to your firm.

Allux Editorial Team

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