The trust test

A 15 minute test for a finance firm website

Pacts Studio

The trust test for a finance firm website

A 15 minute test you can run on any investment, advisory, or professional services site, written for the people who build them.

The first ten seconds

Before anyone reads the investment thesis, they decide whether the firm is real.

It happens quickly. A prospective LP, a client, or a lawyer sending a referral opens the site, and in the time it takes to scan the first screen, they are already answering a quieter question: does this feel like a firm I can take seriously, or does something here make me hesitate?

Trust, on a firm website, is mostly structure, completeness, and the absence of doubt. It is not decoration. A heavier serif, a darker palette, or a slower fade will not save a site that cannot say what the firm does, cannot show its work, or cannot be reached.

This is a test, not a redesign brief. Open a live URL. Work through the sections below. Write down what fails. Then fix the first failure before you polish anything else.

Can they tell what this firm is?

On the first screen, a visitor should be able to name three things: the firm, the city, and the work.

The legal or trading name should be unmistakable. The city, or the cities, should be visible without a hunt through the footer. And the work should be stated in plain language — the actual mandate, not a mood.

“We partner with exceptional founders” is not a business description. Neither is “discreet counsel for complex situations.” Say what the firm does: long-only public equities. Lower-middle-market private equity. Family-office advisory. A litigation boutique. A tax practice for owner-managed companies. If the firm is specialised, the first screen is the place to say so. If it is not, do not borrow the language of a firm that is.

The infrastructure around that first screen should match the claim. The domain, HTTPS, and the email in the footer should look as if they belong to the same entity. A typo domain, a parked redirect, or a personal Gmail sitting under a firm name is a leak. Visitors may not name it, but they feel it.

The hero should belong to this firm and no other. Generic skylines, handshake stock, and trading-floor loops can be dropped onto anyone’s site. If you removed the logo, could you still tell who this was?

Does the page order match how the firm actually works?

A useful default is simple: what the firm does, then proof, then people, then how to start a conversation.

That order can flex, but it should not invert. A four-person boutique should not open like a global bank, with a world map and a string of regional offices that do not exist. A long-only manager running a single strategy should not open like a seed fund. The site should be the size of the firm.

Only state scale when it can be stood behind. Assets under management, years in operation, offices, companies backed — these are useful when they are exact, dated, and consistent with every other public mention of the firm. Empty counters, rounded ranges that shift from page to page, and claims that cannot be sourced do more damage than silence. If the number cannot be said cleanly, leave it off.

Give the visitor somewhere to go for the approach, the representative work or portfolio, the team, the writing, and contact. Those can be pages or clear sections. They do not all have to live in the navigation. They do have to exist, and they have to be findable.

Is the proof real, or just theatrical?

Named investments, matters, or clients beat “selected work” with no names. If names cannot be shown — and often they cannot — say so in one honest line, then describe the work at the level you can. “We do not list portfolio companies” is clearer than a row of grey rectangles.

A consistent format is itself a trust signal. For each entry, give a name (or a careful anonymous description), a date, a status — current or exited, open or concluded — and one sentence on why it belonged in the portfolio or the caseload. The sentence is the part most sites skip, and it is the part a careful reader wants.

Do not build logo walls, “as seen in” rows, or metric animations unless every item is accurate and permissioned. A press mention is not a credential if it was a paid profile. A logo is not permission if nobody asked.

For law and advisory sites, practice areas should carry representative experience, not a grid of twelve generic icons. “Corporate” and “Disputes” mean nothing until they are attached to a kind of client and a kind of problem.

Do the people look like they exist?

Real photographs, real names, real roles. A silhouette, a cropped stock portrait, or “Team member coming soon” on a live site reads as unfinished, not exclusive.

Bios should include prior seats and one human sentence about the work. Education can support that; it should not be the whole story. A list of degrees with no account of what the person actually does leaves the visitor to invent the rest.

Someone responsible should be visible. A form that disappears into an unnamed inbox, with no partner email and no person attached, feels like a black hole. Name the person who will read it, or at least the office that will.

Can someone actually start a conversation?

There should be one clear next step: a short form, a visible partner email, or both.

Ask for the minimum: name, email, and what they want to discuss. Extra fields are often added to make the firm feel protected. They usually just reduce replies. A first message is not a full intake.

Confirm that a person will read it. A thank-you state is part of the product, not a courtesy. If the form fails, or the confirmation never arrives, the firm has already taught the visitor something about how it handles things.

Do not hide contact behind a login. Do not leave a calendar tool as the only door unless that is genuinely how the firm works. Some firms are informal enough for that. Many are not, and a visitor who wanted to write a careful note will not book a twenty-minute slot with a stranger in order to do it.

The form has to work on a phone. Many first enquiries happen after a meeting, in a taxi or a corridor, not at a desk. If the navigation covers the submit button, or the keyboard hides the last field, the conversation ends there.

Does the writing sound like the firm?

Short sentences. No “synergistic value creation.” No “holistic, best-in-class solutions.” If a partner would not say it in a room, it does not belong on the site.

It is useful to say who is not a fit. Serious firms already know this. The site should too. A sentence about mandate, cheque size, geography, or the kind of matter you do not take will save everyone time, and it reads as confidence rather than exclusion.

Insights need dates. A last post from two years ago is a trust leak. It suggests the firm started a publishing programme and then abandoned it. Better to have three durable notes, clearly dated, than a dead feed of twelve. If there is no writing yet, do not put an empty Insights item in the navigation.

Put necessary disclaimers in their place: this is not investment advice, no outcome is guaranteed, past performance is not a promise. Then stop. Do not let legal copy eat the homepage. The people who need the disclaimer will find it. The people who need to understand the firm will not start there.

Does the craft quietly signal care?

Readable type, enough contrast, no decorative script, no autoplaying video. A limited color system — ink, stone, one accent — and enough space to breathe.

The site should load quickly, hold its layout while it does, and keep its links in working order. The mobile navigation should not collapse the firm’s name or bury the contact path behind a gesture that is hard to find.

These are not only aesthetic preferences. A layout that jumps, a type size that fails contrast, or a broken contact link is interpreted as carelessness, and carelessness is expensive in this category.

The footer is part of the test. It should carry the legal name, the city or address, a real email, and a privacy link. If those are missing, the rest of the site has to work harder than it should.

The 15 minute test

Score each item yes or no. Fix the first no before you polish anything else.

1. I can name the firm, the city, and the actual work from the first screen.
2. The domain, HTTPS, and contact email look like they belong to that firm.
3. The page order is approach, then proof, then people, then contact.
4. Proof uses real names or an honest reason why names are withheld.
5. Portfolio or matter entries share one consistent format.
6. There are no fake logos, empty counters, or unsourced claims.
7. Team photos and bios are complete for everyone shown.
8. A responsible human contact is visible.
9. The enquiry form or email works on a phone in under a minute.
10. The writing sounds like the firm and has a date on any insights.
11. Type, spacing, and color are quiet and consistent.
12. The footer carries legal name, location, email, and privacy.

How to report it to a founder: send the twelve answers, then recommend three fixes, in this order: identity, proof, contact. Polish comes last. A better typeface on a site that cannot be contacted is not a better site.

Close

Trust is the absence of doubt, not the presence of decoration. The firms that feel calm on the web usually earned it in the unglamorous places: a clear first screen, proof that can be stood behind, people who exist, and a way to write to them that works.

Pacts Studio is building the Pacts Vault, a library of templates, guides, and tools for this kind of work. If you came to this guide from the waitlist, you already have a seat.