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**CLIENT:** Elder Life Group

**PROJECT:** Content Style Guide

**OBJECTIVE:** Create a content style guide for a national financial-services firm that aligns stakeholders on voice, tone, grammar, sales copy, industry terminology, etc. for editorial purposes

**SUMMARY:** Having created and revamped several of its sales and marketing materials, I was selected by Elder Life Group for its first-ever style guide to ensure the same brand consistency across all communications  
*Note: Extract includes cover, TOC, and sample page*



ELDER LIFE  
GROUP®

# CONTENT STYLE GUIDE

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## WELCOME TO THE ELDER LIFE GROUP CONTENT STYLE GUIDE

Elder Life Group is a widely-respected financial services company in the healthcare and retirement-planning space. Our national footprint offers us valuable exposure across the country. With thousands of people using our products and strategies every day, it's important to convey our messaging consistently and professionally.

Our content style guide ensures a uniform approach to communications with our employees, clients, advisors, attorneys, and target markets. In other words, it keeps us “on brand” as we interact with the world.

This guide pertains to sales and marketing materials, including our website, email campaigns, brochures, planning guides, blog posts, and so on. Certain elements may not apply to contracts and other official documents for which legal counsel would serve as the authority.

Grammar and mechanics primarily follow the Associated Press Stylebook. Of the various style guides used in the US, this is designed to be succinct and reader-friendly. It's also the default standard for journalism, making it one of the more familiar forms for most people.

There are exceptions in our use of AP style. For instance, whereas AP utilizes “Wis.” to abbreviate Wisconsin, we prefer the more common “WI” for simpler reference. However, unless otherwise indicated, use AP style for any rules not accounted for in this guide.

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## TERMINOLOGY

### ELDER LIFE GROUP

Although our company is officially registered as Elder Life Group, LLC, we don't include the "LLC" unless it's required in official documentation. For informal communications, "ELG" is acceptable shorthand, but this shouldn't be used in published sales and marketing materials.

"Elder Life" is not to be used as the title of our company. However, it is to be used for partners in our network (i.e., Elder Life Advisors, Elder Life Attorneys).

### CLIENTS

On the consumer side, we use "clients" rather than "customers." This implies a relationship-based service rather than a transactional one. Don't capitalize "client."

Respect for our older clients is of the utmost importance. When speaking about them on a personal level, we use the term "seniors" most often, but "retirees" and "elders" are also acceptable. We don't use terms that could be poorly received, such as "senior citizens," "the elderly," or distasteful labels associated with medical conditions (e.g., "sickly," "diseased," "lame," "invalid," etc.).

For similar reasons, we use tact in articulating sensitive topics, as the following examples show.

- "When you're old" should be replaced with "When you're older" or "As you age."
- "Upon dying" should be replaced with "Upon passing" or "When the time comes."

### PARTNERS

We work with thousands of financial and legal businesses to support our clients. Collectively, these are our "partners." They aren't "associates," "affiliates," "branches," or otherwise. Don't capitalize "partner."

The terms "advisors," "planners," "attorneys," "lawyers," "counsel," etc. aren't capitalized when used generally. However, when referring to them formally, we use "Elder Life Advisor" and "Elder Life Attorney" exclusively. The following example illustrates the difference.

- "We work with many financial advisors around the country. If you'd like to speak with an Elder Life Advisor, please let us know."