

FIFO WRITING STYLE GUIDE

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WRITING GOALS AND PRINCIPLES

At FIFO, every piece of content we create is designed to:

- **Empower.** Equip readers with the knowledge they need to maximize their financial benefits. Our writing should simplify complex processes, ensuring that even those unfamiliar with tax credits feel confident and in control.
- **Respect.** Recognize the reader’s time and expertise. We communicate with them, not at them, by providing valuable insights without patronizing. Respect their priorities by delivering information that is both concise and thorough, avoiding unnecessary jargon.
- **Educate.** Our goal is to inform, not to sell. We provide readers with accurate, practical information that helps them understand the intricacies of tax credits and how FIFO can simplify these processes for them. Our writing should always aim to fill knowledge gaps and guide them towards informed decisions.
- **Guide.** Serve as a reliable and friendly guide through the complexities of financial benefits. Whether it’s a blog post or a technical guide, our writing should make each step of the process easy to follow and reassure readers that they are making the right choices with our help.
- **Be honest.** Maintain transparency in all communications. We avoid exaggerations, flashy claims, or guarantees of easy success. Instead, we focus on what FIFO genuinely offers: secure, trustworthy, and efficient solutions to help businesses claim the financial benefits they deserve.

In order to achieve these goals, our content is:

- **Clear.** Every piece should be straightforward and easy to understand. Simplify the complexity of financial terms and avoid convoluted sentences. If the subject matter is intricate, break it down into digestible chunks.
- **Useful.** Before writing, always consider the reader's needs. What is their pain point? How does this content solve it? Each piece of content should have a clear purpose, whether it's educating about a specific tax credit or explaining how FIFO's platform works.
- **Professional but approachable.** Write like a knowledgeable professional, but maintain a warm, conversational tone. We're here to provide serious, expert help, but we want to be approachable, not intimidating.
- **Compliant.** Accuracy and adherence to legal standards are paramount. Ensure every statement is backed by truth and is compliant with current financial and tax regulations. Avoid making claims that could imply guaranteed results or outcomes.
- **Adaptable.** Tailor the tone and complexity of the writing to fit the audience, whether it's a new solopreneur or an experienced business owner. Adjust the depth of detail depending on whether the content is an introductory blog post or an in-depth guide.

BRAND VOICE AND TONE

Our voice is professional, educational, and supportive. Avoid being overly formal, but maintain a tone that conveys expertise. Write as if you're guiding someone through complex topics in a way they can easily understand and trust.

- **Tone:** Friendly yet authoritative. It should instill confidence without coming across as condescending or salesy. The tone should reflect trust, empowerment, and security.
- **No salesy language:** Avoid pushy phrases like "Don't miss out" or "Limited time only." Instead, focus on value-driven language, like "Maximize your benefits" or "Get credits for your business."

The brand voice and tone guidelines for FIFO emphasize a blend of professionalism, trust, and accessibility.

- **Friendly vs. corporate/professional:** The tone is 70% corporate/professional and 30% friendly. This balance ensures that FIFO communicates with authority while maintaining a personable and approachable demeanor. It's designed to reassure clients that they are dealing with a reliable and knowledgeable service while also making them feel comfortable.
- **Spontaneous and high energy vs. careful thinking and planning:** The tone leans heavily toward 80% careful thinking and planning with 20% spontaneity. FIFO's messaging should reflect that every decision is well thought out, prioritizing precision and compliance, while still occasionally injecting a sense of energy to create engagement.
- **Modern vs. classic:** FIFO's style is predominantly 90% modern with 10% classic influences. The brand projects itself as a forward-thinking, innovative solution, but retains a touch of timeless professionalism to ensure stability and trustworthiness.
- **Sales focused vs. value driven:** The tone is 50% sales-driven and 50% value-driven. This equal balance reflects FIFO's dual goals: to motivate freelancers and business owners to take action, while emphasizing the inherent value and benefits of their service.

In addition to these ratios, the brand emphasizes:

- **Education and transparency:** Messaging must be clear, upfront, and educational, particularly about fees, processes, and timelines.

- **Trust and security:** The tone should stress the safety and reliability of the platform, using compliance-focused language to deter scammers and highlight FIFO’s secure processes.
- **Reputation and professionalism:** The service must feel personal and trustworthy, avoiding gimmicks or exaggerated promises, while consistently promoting transparency and a reputation for quality.

BRAND VOICE CHART

| Because We Value | Our Voice Is | This Means Our Communication Is | This Means We Are Not |
|------------------|------------------|---------------------------------|-----------------------|
| Trust | Dependable | Transparent | Gimmicky |
| | | Honest | Vague |
| | | Straightforward | Exaggerated |
| Security | Thoughtful | Compliance-focused | Careless |
| | | Protective | Overpromising |
| | | Reliable | Overly Casual |
| Empowerment | Supportive | Encouraging | Discouraging |
| | | Educational | Confusing |
| | | Clear | Complex |
| Innovation | Forward-thinking | Modern | Outdated |
| | | Dynamic | Overly Traditional |
| Accessibility | Approachable | Respectful | Exclusive |
| | | Inclusive | Conceited |

BRAND TONE PROFILE

| Voice Characteristics | Description | Do | Don't | Example |
|-----------------------|--|---|--|--|
| Dependable | Our communication builds trust by being reliable, transparent, and honest, ensuring clients know they can count on us. | Provide clear, factual information. Address concerns with direct and accurate answers. | Don't make vague promises. Avoid using exaggerated or overhyped language. | "We've partnered with trusted organizations like ID.me to ensure your data is always secure, providing a worry-free experience." |

| | | | | |
|------------------|--|--|--|--|
| Thoughtful | We take a careful, compliance-driven approach, showing that we are precise and deliberate in everything we do. | Explain processes step-by-step to show attention to detail. Use measured, compliance-focused language. | Don't rush through explanations or be overly brief. Avoid being too casual or leaving out important details. | "Our automated system ensures all necessary steps are followed, so your claim is handled with the utmost care and compliance." |
| Supportive | We empower clients with education and guidance, making them feel understood and encouraged throughout the process. | Use encouraging and clear language to guide clients. Offer practical advice and tips. | Don't be condescending or overly technical. Avoid using language that feels overly complex or intimidating. | "We're here to help you through each step, making sure you feel confident in understanding and accessing your financial credits." |
| Forward-thinking | We embrace innovation to provide modern solutions, focusing on fairness and efficiency without overpromising speed. | Highlight the benefits of automation and how it ensures fairness. Encourage clients to apply early, explaining that the sooner they apply, the sooner their claims will be processed. | Don't make claims about how fast the process is. Avoid language that suggests preferential treatment or expedited services. | "With our first in, first out process, we ensure that all claims are handled fairly, without prioritizing larger claims. The sooner you apply, the sooner we can begin processing your claim." |
| Approachable | We make complex systems easy to understand, using a tone that is friendly yet professional to foster trust while maintaining boundaries. | Use simple, clear language. Maintain a professional but welcoming tone. | Don't oversimplify to the point of being condescending. Avoid using overly casual or informal language. | "We've designed our platform to be easy for you to use, so you can understand your eligibility without getting bogged down by complex terminology." |

WRITING ABOUT FIFO

Our name, FIFO, reflects the efficient and systematic approach we bring to financial solutions. Much like the accounting principle it's named after, FIFO emphasizes clarity, organization, and priority, ensuring our clients' needs are addressed with precision.

Guidelines for writing about FIFO:

- **No abbreviations:** Do not create any new abbreviations or alter the name for different services or products. We should always be referred to as FIFO in all communications—no variations like "F.I.F.O" or "First Out."
- **Consistency:** Maintain consistency in referring to the company across all channels. Whether in a blog, email, or social media post, use FIFO consistently once the full name has been introduced.

GRAMMAR AND MECHANICS

This section outlines the foundational rules and specific guidelines for writing clear, consistent, and professional content for FIFO.

Basics

- **Write for all readers:** Some will read every word, others will skim. Organize content with clear headers, subheaders, and concise paragraphs to make it easy for everyone to navigate.
- **Focus your message:** Lead with the most important information. Each sentence, paragraph, and section should convey a clear, focused message. Prioritize clarity in every piece of content.
- **Be concise:** Use short words, sentences, and paragraphs. Cut unnecessary modifiers and filler words. Make every word count.
- **Be specific:** Avoid vague language. Always be direct and provide the exact information the reader needs.
- **Be consistent:** Follow the guidelines in this style guide. Consistency builds trust and helps maintain a cohesive brand identity across all communications.

Grammar and mechanics guidelines

Active voice. Always use active voice. In active voice, the subject of the sentence performs the action, which makes the writing more direct and engaging.

- Yes: FIFO automates the credit application process.
- No: The credit application process is automated by FIFO.

Exceptions may be made when emphasizing the action over the subject.

- Example: Your account was flagged by the system.

Capitalization. Use sentence case for all text, except for H1 headings, where title case may be used.

- Yes: We offer secure and compliant services.
- No: We Offer Secure And Compliant Services

For email addresses and URLs, always use lowercase.

- Example: info@fifocom
- Example: fifocom

Avoid capitalizing random words within sentences, such as "website," "internet," "online," or "email."

Contractions. Contractions give writing a friendly, approachable tone. Use them when appropriate, but ensure that the tone matches the content's formality.

- Yes: We're here to help you secure your financial benefits.
- No: We are here to help you secure your financial benefits (too formal for most contexts).

Emoji. Use emoji sparingly and only in informal contexts like social media or casual communications. Ensure they fit the message and are not overused.

- Yes: 🎉 You've successfully claimed your credits!
- No: Congratulations on your successful tax credit application! 🎉🎉🎉

Numbers. Spell out numbers at the beginning of sentences and for single-digit numbers. Use numerals for numbers 10 and higher, unless the context is informal or conversational.

- Yes: Eight clients signed up today.
- Yes: We helped 14 businesses claim credits last month.
- No: We helped fourteen businesses.

Numbers over 3 digits should include commas for clarity:

- Yes: 1,000
- Yes: 150,000

For large numbers, abbreviate only if space is limited, like in social media posts:

- Example: 10k clients

Dates. Spell out the day and month in most cases. Abbreviate only when space is limited.

- Yes: Monday, January 1
- No: Mon., Jan. 1

WEB ELEMENTS

Every piece of content on FIFO's website should be user-friendly, accessible, and optimized for search engines without compromising on clarity or professionalism. This section outlines the style and structure for various web elements, ensuring a consistent experience across the site.

Alt text. Alt text is vital for accessibility and SEO. It should briefly describe the content of the image, focusing on the essential details. Ensure the description is concise and relevant.

- Yes: "Person using a computer to fill out a tax credit application on the FIFO platform."
- No: "Image of a person."

Buttons. Button copy should always include a verb and be action-oriented. Keep the text short and clear, using sentence case. It's okay to use ampersands if necessary for brevity.

Examples:

- Get started
- Sign up now

- Apply for tax credits
- Contact us

Checkboxes. Use sentence case for checkboxes and make sure they are straightforward and relevant to the form.

- Example: “I agree to the terms and conditions.”

Drop-down menus. Use title case for menu headings and sentence case for individual menu items.

- Example of heading: Account Settings
- Example of menu item: Change password

Forms. Form titles should clearly convey the purpose of the form. Use title case for form titles and sentence case for form fields. Keep forms as short as possible, collecting only essential information to streamline the user experience.

- Title: Check Your Eligibility
- Form field: First name, Last name, Email address

Do not ask for unnecessary personal information. If asking for sensitive information (e.g., gender), provide a field where users can fill in their own response rather than a drop-down menu.

Headings and subheadings. Headings and subheadings guide readers through the content and help with SEO. Use sentence case for all headings and subheadings, except for H1 headings, which should use title case. Avoid end punctuation unless using question marks or when a heading consists of multiple sentences.

- Example of H1: Maximize Your Financial Opportunities
- Example of H2: How FIFO helps businesses claim financial credits

Links. Provide a link whenever referring to external content or additional resources. Link directly to relevant keywords rather than using generic phrases like “click here” or “read more.” Ensure links are visually distinct from regular text and have a hover state for interactivity.

- Yes: Learn more about the [Sick and Family Leave Credit].
- No: [Click here] for more information.

Don't include preceding articles (a, an, the, our) when you link text.

Always make links open in a new tab.

Lists. Use lists to organize steps, ideas, or information groups. For numbered steps, use a numbered list. If order doesn't matter, use a bulleted list. When writing lists:

- If list items are sentences: Use proper punctuation and capitalization for all items.

- If list items are not complete sentences: Don't use punctuation, but capitalize the first word of each item.

Titles. Titles help organize pages and guide both users and search engines. Titles should be in title case, with no end punctuation unless it's a question. Titles should be descriptive and include relevant keywords to assist with SEO.

- Example: How to Claim Financial Credits with FIFO

SEO. Write for humans, not search engines. However, it's important to structure content in a way that helps both users and search engines find relevant information easily.

- Organize content: Group information around a single topic or theme.
- Use descriptive titles and headings: Include relevant keywords but avoid keyword stuffing.
- Image alt text: Provide descriptive alt text for all images to improve accessibility and help search engines understand the content.

COMPLIANCE LANGUAGE

No promises of easy financial gains. Be cautious of statements that suggest guaranteed outcomes, such as "you will" or "this will." Instead, use phrases like "FIFO helps maximize" or "you may qualify."

Disclaimers: Where applicable, include disclaimers about the complexity of the tax process and that individual outcomes may vary.

Examples of preferred language:

- **Do:** "FIFO's automated platform simplifies the process of claiming the financial credits you are eligible for."
- **Don't:** "Don't miss out on your chance to grab free money!" (This sounds too gimmicky and makes unwarranted promises.)

EDUCATIONAL CONTENT

At FIFO, educational content appears across various platforms, including our website, blogs, tutorials, and social media platforms. This section outlines the principles for writing educational content and defines the types of educational content used to inform and guide our audience.

Basics

People consuming educational content are typically looking for clear answers to specific questions, often related to tax credits and incentives. Whether they are new business owners or seasoned entrepreneurs, our goal is to provide accurate, relevant information in a straightforward manner.

Before writing, consider your audience's background, their goals, and their current emotional state. Ask yourself:

- Who is the audience? Are they a new FIFO user, an established entrepreneur, or a potential partner?
- What is their goal? Are they looking to complete a task or understand a complex tax credit process?

- What is their mindset? Are they overwhelmed by tax regulations, or are they simply seeking more information?

FIFO's audience often approaches educational content with the need to simplify complex financial processes. It's crucial not to overload them with unnecessary details, especially given the diverse learning styles of our users. Keep sentences and steps focused, concise, and clear.

Types of educational content

- FAQs, guides, and troubleshooting tips
- Tutorial videos hosted on our website or YouTube
- Webinars and workshops that provide in-depth insights into tax credits
- Social media content, such as how-to videos and Instagram reels
- Internal training documents for staff onboarding and ongoing education
- Partner training resources, helping stakeholders better understand our offerings

Guidelines

Writing educational content

When writing educational content, follow the guidelines in the Voice and Tone and Grammar and Mechanics sections. Additionally, keep these pointers in mind:

- **Stay relevant to the topic.** Focus on providing the answer or solution directly related to the topic at hand. Avoid straying into unrelated areas. If needed, link to other resources for additional information. If you find yourself moving off-topic, consider creating a separate article or video to address those points.
- **Use clear headings and scannable content.** Many users will skim educational content to find the information they need. Use short, descriptive headings that clearly reflect the content. Break up content with subheadings to help users navigate easily.
- **Strive for simplicity and clarity.** Use simple, direct language, and avoid jargon or complex terms unless they are absolutely necessary. Keep sentences under 25 words and limit paragraphs to a few sentences to avoid overwhelming the reader.
- **Use visual aids.** Screenshots, videos, and GIFs make educational content easier to follow. Be sure that visuals are focused on the specific action or concept being explained, and crop screenshots to show only the relevant part of the screen.

Formatting educational content

Consistency in formatting helps users understand and follow the steps more easily. Here's how to format specific elements in FIFO educational content:

Capitalization: Capitalize proper names of FIFO features, tools, and teams.

- Examples: Sick and Family Leave Credit, Client Support team

Bolding: Use bold to emphasize important navigation or button labels.

- Examples: Click **Submit** after completing the form.

Instructions: Use numbered lists when providing step-by-step instructions to make processes easier to follow.

- Example:
 1. Log in to your FIFO account.
 2. Navigate to the **Credits & Incentives** page.
 3. Click **Start Application**.

WRITING DIFFERENT CONTENT TYPES

WRITING EMAIL NEWSLETTERS

Email newsletters are an essential way to inform and educate FIFO users about our platform, updates, and industry insights. Whether announcing new features, sharing tips, or delivering regular updates, every newsletter should provide value and clarity. Here's how to craft effective email newsletters for FIFO.

Basics

Our email newsletters aim to empower, inform, and engage FIFO users. The most common types of email content include:

- Product and feature announcements
- Tips and best practices for using FIFO
- Monthly newsletters with insights on tax credits and financial updates
- Automated onboarding series for new users
- Invitations to webinars or educational workshops
- System alerts about updates or maintenance

Guidelines

Email newsletters generally follow the style points outlined in the Voice and tone and Grammar and mechanics sections. However, there are a few additional considerations for writing email-specific content.

Consider all elements

Every email newsletter consists of the following elements. Make sure each is in place before sending:

- **From name.** This will usually be the company name, FIFO, or a specific team (e.g., FIFO Support Team). It helps readers quickly identify the sender.
- **Subject line.** Keep the subject line clear and informative. There's no perfect length, but many email clients display only the first few words. Focus on telling, not selling, what's inside. Subject lines should always be in sentence case.
 - Example: "Don't fall for the SETC tax credit scam"
- **Preheader text.** The preheader appears next to the subject line in the inbox. Use this space to provide additional context or highlight the main benefit of opening the email.
 - Example: "Learn how FIFO's latest updates simplify credit applications"
- **Body copy.** Keep your content concise and to the point. Ensure each paragraph relates to the main topic and adds value. Avoid overwhelming readers with too much information in one email.

- **Call to action (CTA).** Make the next step obvious. Whether you're asking people to learn more, sign up for a webinar, or explore new features, provide a clear CTA so readers know what to do next.
 - Example: "Start your application today" or "Learn more about the new updates"
- **Footer.** Follow [CAN-SPAM regulations](#) by including an unsubscribe link, mailing address, and permission reminder at the bottom of each email.

Consider your perspective

When sending email newsletters from FIFO, use third person ("we" or "FIFO"). If sending a newsletter as an individual, use first person ("I").

- **Use a hierarchy.** Most users will quickly scan the email, especially on mobile devices. Put the most important information at the top, and structure the email with clear headings to make it easy to skim.
- **Include a call to action.** Always include a clear CTA. Whether directing readers to a blog post, webinar registration, or platform feature, make the next step obvious. You can use a button or a text link within the closing paragraph to encourage action.
- **Avoid unnecessary links.** More than 50% of emails are read on mobile devices. Limit the number of links to avoid clutter and focus attention on the most important resources. Too many links can lead to accidental taps on small screens.
- **Use alt text.** Some email clients disable images by default. Ensure every image includes descriptive alt text so users who can't view the images can still understand their context.
 - Example: "User dashboard showing successful tax credit applications"
- **Segment your audience.** Not all subscribers are interested in every topic. Use segmentation to ensure that the content is relevant to each audience. For example, new users may need onboarding tips, while experienced users might appreciate advanced features or case studies.
- **Test your campaigns.** Always test your emails before sending. Use the preview mode to see how the email will appear in different inboxes and devices. Send a test email to a colleague for feedback and make adjustments as necessary.

WRITING FOR SOCIAL MEDIA

We use social media to build relationships with FIFO users, share updates, and educate our audience about maximizing tax credits. However, social platforms also present opportunities to make missteps that could harm our brand. That's why we approach social media with a careful and deliberate strategy to ensure our messaging aligns with FIFO's professional, compliant, and educational tone.

Basics

FIFO maintains a presence on several major social media platforms. Here's what we typically post on each

- LinkedIn: educational content, product news, industry insights, client success stories, and recruiting
- Facebook: company updates, product news, educational resources, and blog content
- Instagram: client testimonials, office culture, behind-the-scenes insights, and educational graphics
- X: product updates, tax tips, industry news, and customer support

Each platform has its unique tone and audience, but the guidelines outlined in this section apply to all of FIFO’s social channels.

Guidelines

Our social media writing follows the style points outlined in the voice and tone and grammar and mechanics sections. However, here are additional pointers to consider when writing for social channels.

Write short, but smart. Keep social media copy concise, even if the platform doesn’t enforce a character limit. Always aim for clarity and brevity without sacrificing professionalism.

- LinkedIn and Facebook: Aim for 2-3 short sentences or a concise paragraph
- Instagram: Use 1-2 sentences or a short phrase. Feel free to include relevant emoji if appropriate for the context
- X: Stick to the 280-character limit by keeping the message clear and direct

Simplify your message by focusing on the key takeaway or action. Avoid abbreviating words in an unprofessional way (e.g., "u" for "you" or "4" for "for"). Use accepted abbreviations sparingly, such as "info" for "information."

Engagement. Maintain FIFO’s professional tone when interacting with users or other brands on social media. Use proper grammar, punctuation, and avoid excessive exclamation points. We do not ask for retweets, likes, or shares. Always keep conversations respectful, informative, and aligned with FIFO’s brand voice.

- Yes: “Learn how to avoid scams like SETC and get the real credits you are eligible for: [link]”
- No: “Hey @clientname, share our new post! [link]”

Feel free to tag relevant accounts when it adds value to the conversation or highlights a partnership, but avoid tagging others just to get attention.

Hashtags. Use hashtags sparingly and deliberately. They can be helpful for event promotion, conferences, or specific campaigns, but we avoid excessive hashtag use or jumping on trending hashtags that don’t align with our brand or content.

- Yes: “Join us at #TaxCreditSummit2024 to learn how FIFO simplifies compliance for businesses.”
- No: Using random trending hashtags to increase visibility unrelated to FIFO’s message.

Trending topics. Avoid commenting on trending topics or current events that do not directly relate to FIFO or the financial industry. Be mindful of the broader news cycle when scheduling or promoting content. In times of major news events, consider pausing scheduled posts out of respect for the larger context.

WORD LIST

This section provides guidance on words and phrases to use carefully and those to avoid when writing for FIFO. These guidelines ensure consistency, professionalism, and alignment with our brand values of compliance, trustworthiness, and education.

WORDS TO USE CAREFULLY

| Word | Explanation | Use instead |
|------|-------------|-------------|
|------|-------------|-------------|

| | | |
|------------|---|--|
| Guarantee | Only use when legal backing or a strong claim can be made. Avoid implying absolute certainty in outcomes related to tax credits or financial processes. | Maximize your chances, help ensure compliance |
| Free | Use cautiously when referring to services or products. Ensure that no hidden costs or obligations are associated with what is labeled as 'free.' | At no additional cost, complimentary |
| Fast | Financial processes, especially around tax credits, often require time for processing and review. Avoid claims about speed. | Efficient, with clear steps |
| You will | Avoid using definitive statements about outcomes or results. | You may qualify for, FIFO can help you achieve |
| Simplified | While we aim to make the process as simple as possible, remember that some tasks still require careful attention and steps. | Streamlined, easier to navigate |

WORDS TO AVOID

| Word | Explanation | Use instead |
|-----------------------------------|--|---|
| Easy money | Implies that financial gains come with little effort or risk, which is misleading. | Maximize your financial opportunities |
| Guaranteed savings | Tax credits and savings vary based on individual circumstances. Never promise specific outcomes. | Potential savings, may qualify for credits |
| Hassle-free | While FIFO simplifies processes, there can still be complexities, particularly around compliance and tax regulations. | Streamlined, effortless with our support |
| Don't miss out | This is overly salesy and creates unnecessary urgency. | Explore your options, learn how to maximize |
| Limited time only | Avoid creating urgency unless it's for an actual deadline related to official tax credit programs or regulatory dates. | Provide clear and factual timelines for deadlines |
| Tax credits | Try to avoid the term tax credit. | Credits and incentives |
| SETC (Self employment tax credit) | Only refer to the SETC if you are pointing out that it is a scam. | Don't fall for the SETC scam. |