

3 | Asset Vantage — Tone-of-Voice Guideline Template

3.1 Brand Essence

One-line promise

Asset Vantage is the Financial Operating System of choice for Family Offices.

AV empowers global families and their trusted advisors to make better informed financial decisions.

Powered by integrated general ledger and performance reporting technology, this Financial OS is the backbone for family offices and their advisors.

Brand Narrative Snapshot

Founded by a Family Office of a technology group frustrated with spreadsheet chaos, AV exists to give families enterprise-grade control over multigenerational wealth.

3.2 Voice Pillars (Who We Are in Every Word)

Pillar	What It Sounds Like	What It Never Sounds Like
Authentic	Cites facts, client outcomes, or data to support claims.	Marketing fluff; superlatives without proof.
Subject-Matter Expert	Explains complex finance in clear English; uses necessary (not gratuitous) jargon.	Overly technical, dense, or academic papers.
Bold	States risks & opportunities plainly; challenges status-quo tools.	Arrogant; dismissive of peers.
Peer-to-Peer	Uses “we/you” to speak as collaborators.	Speaking down (“We educate unsophisticated investors...”).
Confident	Active voice; decisive verbs.	Hedging (“may”, “might”, “possibly”) unless legally required.

3.3 Writing Principles

1. **Lead with the “So What”** – start with the outcome, then provide detail.
2. **Prove Every Claim** – link to client stories, data points, or product evidence.
3. **Plain Before Fancy** – prefer “tax-efficient structures” over “bespoke fiscal architectures.”
4. **Short, Active, Human** – aim for sentences of ≤ 20 words.
5. **Respect the Reader’s Time** – use bullets instead of long paragraphs for dense information.

3.4 Tone by Touchpoint

Channel	Tone	Typical Length	Formality Guide
Website & Blog	Confident · Advisory · Inspiring	8–12-word H1, short paragraphs	First-person plural (“we”); avoid clichés.
Product UI	Direct · Reassuring	≤ 40 characters per action	Sentence case; verb first (“Reconcile now”).
Client Emails	Warm · Expert	≤ 150 words	Named sign-offs; reference client context.
LinkedIn Ads	Bold · Benefit-led	≤ 25 words + CTA	One proof point + outcome + CTA.
Thought-Leadership PDFs	Analytical · Data-backed	Variable	Insert pull-quotes, charts; cite sources.

3.5 Jargon & Terminology

- **Allowed:** GL, NAV, IRR, STT, GST, STCG, LTCG (for finance-savvy audiences).
 - **Avoid:** “synergies,” “next-gen digital transformation,” “leverage unparalleled.”
 - **Rule:** Spell out the acronym on first use; abbreviate thereafter.
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3.6 Do’s & Don’ts Quick Sheet

Do	Don’t
“Running outdated systems is like riding a two-wheeler on a highway without a helmet—risky and bound to fail.”	“Your systems are terrible and obsolete.”
“Asset Vantage powers 400+ family offices globally.”	“Asset Vantage is the only global solution.”
Use numbers with context (“\$400 B assets tracked”).	Spray statistics without attribution.
State competitive edges factually (“accounting-first ledger; 1-day reconciliation”).	Use unsubstantiated superlatives (“world-class,” “game-changing”).

3.8 Review Checklist (attach to every draft)

- ☐ Leads with an outcome or insight?
- ☐ Includes at least one proof point or example?

- ☐ Free of fluff words and unverified claims?
 - ☐ Tone matches the channel & audience table?
 - ☐ Reads aloud like a peer conversation (no third-person corporate speak)?
 - ☐ Sentences mostly ≤ 20 words?
 - ☐ Jargon defined on first use?
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3.9 Micro-Style Rules

Oxford comma on

Title case for headings

Write dates as “5 August 2025”

Numerals: spell out one-nine, use digits 10+, use 3,3,3.xx decimal formatting for non INR numbers, use 2,2,3.xx decimal formatting for INR numbers.

Currency: INR 2crore / US\$ 3million

US Spellings / grammar (avoid British spellings)

No em dash usage