

Nest Financial Planning

Brand Voice Guide **August 17, 2025**

|Brand Foundation

What Our Brand Does

We help everyday families feel more in control of their money by offering practical financial planning that fits real life. From budgeting to retirement prep, we provide clear, personal guidance without jargon or judgment.

Audience

Our clients are thoughtful, motivated families navigating big life transitions—buying a home, raising kids, paying off debt, or preparing for retirement. They often feel unsure if they’re “doing it right” and want honest, practical guidance without jargon or pressure.

Why People Choose Us

We serve individuals and families in their 30s to 50s who are raising kids, managing careers, or supporting aging parents. They want clarity and confidence with money but often feel overwhelmed, unsure where to start, or excluded from traditional financial advising.

Competitive Differentiators

Unlike traditional advisors, we’re not focused on people who already have wealth. Our approach is judgment-free and tailored to real-life priorities like raising kids, paying down debt, and saving for milestones. We don’t use jargon, don’t push investments, and never pressure—just steady, clear guidance from people who’ve been there.

Mission Statement

Our mission is to make financial planning human, clear, and accessible for everyday families. We help people cut through the confusion, reduce stress, and build steady confidence with money through judgment-free, practical guidance that fits their real lives.

Vision Statement

We envision a future where financial planning feels approachable for everyone—not just the wealthy. Nest aims to redefine what it means to get advice, making it normal for families to have a trusted partner who brings clarity, calm, and confidence to money decisions.

Brand Promise

We promise approachable, judgment-free financial planning that meets people where they are—so families can stop stressing about money and start feeling steady, confident, and in control.

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Values

- **Clarity:** We explain things in plain language so clients feel confident, not confused.
- **Empathy:** We listen without judgment and meet people where they are.
- **Practicality:** We focus on real-life plans that people can actually follow.
- **Respect:** We believe every client deserves to feel heard and valued.
- **Steadiness:** We provide a calm, consistent presence through life's financial ups and downs.

Brand Pillars

- **Judgment-Free Support:** We create a safe space for clients to ask questions and get clear answers—so they feel respected, not intimidated.
- **Practical Plans:** Our advice is rooted in real life, not abstract theory—so families can take action that feels doable and effective.
- **Clarity Over Jargon:** We explain finances in plain language—so clients walk away actually understanding their plan.
- **Family-Centered Focus:** We specialize in helping families through life's transitions—so they can move forward with confidence and steadiness.

Positioning Statement

Nest Financial Planning helps everyday families who feel overwhelmed or left out of traditional advising. We provide clear, judgment-free guidance for real-life financial goals, helping people feel more at ease, in control, and hopeful about their future.

|Core Messaging

Persona Snapshots

Busy Families in Transition

Parents in their 30s–40s raising kids, managing careers, and balancing big expenses. They want to save for the future while still keeping daily life afloat. They’ve tried apps and blogs, but they need a trusted partner who makes things simpler and less stressful.

Late Starters Seeking Confidence

Individuals or couples in their 40s–50s who feel behind on retirement, debt repayment, or savings goals. They’re worried it may be “too late” but want reassurance and a clear plan that helps them catch up without shame.

First-Time Financial Planners

People who’ve never worked with an advisor before and assumed they wouldn’t qualify. They want a safe place to ask questions, build financial confidence, and finally feel like they have a steady guide who speaks their language.

Messaging Themes

- **Clear Guidance That Fits:** We break down money decisions in a way that’s easy to understand and act on—so families feel confident, not confused.
- **Support Without Judgment:** Our clients never have to pretend they know more than they do—we meet them where they are and help them move forward.
- **Plans for Real Life:** We design strategies that match people’s actual lives and goals—so progress feels practical, not overwhelming.
- **A Steady, Human Approach:** We provide calm reassurance during financial stress—so clients know they’re not alone in figuring it out.

Elevator Pitch

We’re Nest Financial Planning, and we help everyday families make sense of their money. From budgets to retirement, we create clear, judgment-free plans that fit real life—so you can finally stop stressing and feel confident about the future.

One-Liner

Clear, judgment-free financial planning for families who want peace of mind with money

|Core Messaging

About (~50 words)

Nest Financial Planning helps everyday families take control of their money with clear, judgment-free guidance. From budgeting to retirement, we create practical plans that fit real life—so clients feel less stressed, more confident, and ready for the future.

About (~100 words)

Nest Financial Planning helps families who often feel overlooked by traditional advisors. We provide clear, judgment-free financial guidance that fits real life—covering everything from budgeting and debt payoff to saving for college or retirement. Our clients tell us they feel relieved and supported, finally able to understand their money without pressure, jargon, or shame. We specialize in helping people navigate life's transitions with calm, practical advice that works for them. At Nest, our goal is simple: to make financial planning human, approachable, and genuinely helpful for the families who need it most.

CTAs

Primary CTAs:

- Let's build your plan today
- Schedule your first session
- Start feeling confident with money

Secondary CTAs:

- Explore our resources
- Join a workshop
- Get practical money tips

|Tone + Style

Tone of Voice Summary

Our voice is clear, approachable, calm, thoughtful, and warm. We speak like a trusted friend who explains things simply, without jargon or judgment. We balance clarity with empathy—always aiming to help people feel steady, respected, and in control.

Tone Traits:

Clear, Approachable, Calm, Thoughtful, Warm

Tone Spectrums

	<u>We are a:</u>
Formality: (1) Formal → Casual (10)	9
Energy: (1) Calm → High-Energy (10)	3
Clarity: (1) Technical → Approachable (10)	9
Playfulness: (1) Serious → Playful (10)	4
Warmth: (1) Neutral → Warm (10)	9
Personality: (1) Reserved → Expressive (10)	5
Voice Structure: (1) Narrative → Short/Sharp (10)	6

|Tone + Style

Voice Guardrails:

Avoid jargon like “wealth management,” “asset allocation,” or “portfolio optimization.” Steer clear of elitist or salesy language such as “exclusive” or “high-net-worth.” Never sound cold, overly casual, or gimmicky—our voice must stay clear, calm, and respectful.

Do

- Use plain language that feels like a conversation with a trusted friend
- Explain financial concepts in simple terms before using any technical language
- Acknowledge feelings and concerns openly (“It’s normal to feel overwhelmed...”)
- Use phrases like: “let’s figure this out together,” “you’re not behind,” “this is doable”
- Lead with empathy, then provide clear guidance
- Keep sentences relatively short and easy to follow

Don’t

- Use financial jargon without explanation: “wealth management,” “asset allocation,” “portfolio optimization,” “risk tolerance”
- Sound elitist or exclusive: “high-net-worth,” “exclusive,” “premier,” “sophisticated investors”
- Be overly casual or gimmicky (no memes, no trendy financial buzzwords)
- Sound salesy or pushy
- Make people feel judged, behind, or “less than” for not knowing something
- Use cold, detached corporate language
- Talk down to clients or assume they know financial terms

Watch for overuse

- “Plan/planning” → alternatives: roadmap, strategy, approach, path forward
- “Control” → alternatives: confident, steady, at ease, prepared
- “Clear/clarity” → alternatives: straightforward, simple, plain, easy to understand
- “Real life” → alternatives: everyday, practical, your situation, what actually works

Tone to avoid

- Cold or overly formal (sounds like a bank or investment firm)
- Overly hyped or promotional (we’re not selling excitement, we’re offering calm)
- Preachy or condescending (never “you should have...”)
- Shame-based (avoid phrases like “if only you had...” or “most people already...”)
- Flippant about serious concerns (money stress is real, we take it seriously)

|Tone + Style

Voice Examples

Example 1: Website Homepage

Before (too formal/cold):

"Nest Financial Planning provides comprehensive wealth management services to optimize your financial portfolio and maximize long-term value creation."

After (Nest voice):

"We help everyday families make smart decisions about money—from budgeting to retirement—without the jargon, judgment, or pressure. Just clear guidance that fits real life."

Example 2: Social Media Post

Before (too casual/gimmicky):

"💰💵 MONEY MOVES ALERT 💵💰 Stop sleeping on your finances!! Time to LEVEL UP your portfolio game!! 🚀🔥"

After (Nest voice): "Feeling behind on retirement savings? You're not alone—and it's not too late. Let's talk about creating a plan that works for where you are right now, not where you think you should be."

Example 4: Blog/Resource Content

Before (too technical):

"Optimizing your asset allocation requires understanding your risk tolerance profile and implementing a diversified portfolio strategy that balances growth potential with downside protection."

After (Nest voice):

"Where should your money go? That depends on your goals and timeline. If you're saving for something years away, you might invest differently than if you need the money soon. We'll help you figure out what makes sense for your situation."