



*7 Must Do Steps to Create Engaging Content*

# UNFORGETTABLE:

## Make Your Financial Copy Pay Off

*A guide for financial writers, business  
owners, and editors*

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*A note from the author Melissa Carraro*

Please feel free to share this book with other financial writers or editors. Forward it by email or print a paper copy to share. If you want to share it on social media or post it on your blog, please contact me to let me know. I can be reached at [acpawrites@gmail.com](mailto:acpawrites@gmail.com) or by phone or WhatsApp at +1.303.870.0959. Thanks, and enjoy the book.

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## **#1: Avoid jargon**

Jargon unnecessarily complicates your message. Keeping your writing simple increases readability and clarity.

Explain your topic like you are speaking to a 10-year old. Or to someone whose first language isn't English. That means don't use the usual jargon or buzzwords that are a part of your everyday vocabulary.

### *Which would you prefer to read?*

**#1** The Tax Cuts and Jobs Act transitions the U.S. from a global based tax system to a territorial based tax system via the creation of Section 965 which establishes the transition tax through a deemed repatriation of foreign deferred earnings.

OR

**#2** Moving away from taxation of world-wide income, the recent tax reform imposes tax on U.S. corporations only on profits generated in the U.S.

It is obvious that both statements are correct. However, #1's use of jargon is only "readable" to tax professionals. While #2 conveys the same information in an easy-to-understand and simple statement.

Translating jargon into easy-to-read content illustrates you understand the topic. The ability to break down complex topics into simple words shows that you value your reader's time. Readers should not have to consult Wikipedia when reading your content.

*I know you're saying, "I need to use technical terms to explain a topic."*

And I'm not saying you shouldn't use them.

When technical terms are necessary, I use the following 3-step approach:

**1. Define the term**

- i. Example: Section 1031 of the tax code allows business property to be exchanged for "similar or like property" to delay paying capital gains tax.

**2. Give an example of the term in plain language**

- i. Example: Sale of a rental property and purchase of a similar rental property within 45 days

**3. Find a simpler way to say the term**

- i. Example: These "like-kind" exchanges

Don't alienate your reader by using jargon. Be a human...not just a finance professional. This allows readers to relate to you and your topic. It also makes it easier to engage with you.

## **#2: Be Human**

Your reader wants to know you are a normal person. They want to do business with **YOU**, not a stuffy accountant, lawyer, financial advisor, etc....

You are an expert courtesy of your credentials and experience. Readers know that.

Most people already think you are a super hero because you enjoy numbers. Although clients want a super hero helping with their finances, they also want a normal ordinary person to relate to them.

Here's a personal example:

I was a practicing CPA for nearly 20 years before becoming a copy and content writer. I landed dozens of clients because I marketed myself as the “A-typical Accountant”. I am both hugely nerdy and wildly outgoing. I defied the CPA stereotype. In fact, when I met random strangers I was often mistaken for someone in sales, marketing, public relations, or even a housewife. (*Note*: if they knew I burn water and fear kitchens, they'd know I'm definitely not housewife material!) I asked about their kids, vacations, parents, and favorite sports team. The point is I was able to connect with them on a human level.

Don't be afraid to not sound like a financial services company. In fact, flip that sentence around. *Be afraid* of sounding like a financial services company. Create a unique tone and voice.

***Note: Selling yourself as “Trusted” and “Established” means nothing!***

If you aren't trusted or established...well, then you're probably in the wrong profession. Those words are tired and overused. Don't underestimate the importance of showing your personality.



### #3: Know your audience

Quiz time:

Who is most interested in reading about the benefits of 529 college savings plans?

- A. New parents
- B. Retired businessman
- C. 24-year-old recent college graduate

Hopefully you picked A.

New parents worry about funding their child's college education. Letting them know how they can lessen that worry **and** save on their tax bill adds HUGE value for them. You'll score massive super hero points!

Know thy customer. Be considerate of their feelings, beliefs, and desires. Consider what keeps them up at night or what question they need answered...and then answer it.

#### **#4: Create captivating headlines**

Your industry is heavily regulated. Law, regulations, and standardized procedures are dry and uninviting.

But that doesn't mean your content has to be boring. It starts with a unique headline. It must draw the reader in. Make them want to read what you have to say.

#1: Business tax updates from the U.S. tax reform

OR

#2: 3 ways the new tax law can save your small business \$\$ on taxes

The key to a good headline is that it must be specific to grab your reader's attention. Your reader is saturated with content from email to social media. Start on the right foot by writing a great headline. One that compels the reader to keep going.

***But be careful...don't overhype.***

Because the article must deliver good, relevant, and meaningful information to back up the headline. If not, you lose credibility with your reader.

## **#5: Use infographics to illustrate numbers**

Numbers and statistics are the heart of your business. **YOU** love numbers!

While you don't mind getting lost in tax tables or annual reports...most people would rather be picked for jury duty or stuck in an elevator than look at any of those things.

***One way to make numbers less intimidating is using infographics.***

Infographics take dense data and turn it into a visual.

[Thompson Reuters](#) even broke down why visuals are oh so important in marketing for accounting firms.

- 90% of information transmitted to the brain is visual
- The brain processes visual content 60,000 times faster than text

I enjoy a good infographic. You probably do too. And so does your reader. Sometimes seeing numbers presented in a visual allows me to remember them. I can recall the color or the layout to conjure up the details.

Using infographics shows you value your reader's time. We process visuals at the speed of light. Think of how much information can be communicated in a well-crafted infographic!



# 2018 TAX REFORM

VERSUS

## 2017

HOW YOUR TAXES CHANGE UNDER THE  
NEW TAX REFORM



Created by: A CPA Writes

Email: [acpawrites@gmail.com](mailto:acpawrites@gmail.com)

I created this infographic in less than 30 minutes. It communicates better than I could narrate it with text. It provides a lot of bang for your buck!

## **#6: Add value**

So, you've written 10 articles on How to Plan for Retirement. You're *technically* generating content. You have cast a wide net to catch a lot of fish.

***But***...your articles aren't generating any interest. Why?

Because in reality, your net was electrified...and fish won't come within 50 feet of it.

## **Why?**

Because the topic is too broad, overused, and lacks originality.

Don't regurgitate the same information that's already out there. Find a topic that a clearly defined audience feels strongly about. And discuss it.

Write:

- A white paper on new lease accounting rules for the construction industry
- A blog post on who is a better fit for a Roth IRA over a traditional IRA
- An article on the taxability of social security benefits for expat retirees

Recall that example earlier about the new parents and 529 plans? Imagine the value you add to anxious parents when they learn how to put money away for little Billy's college education.

The point is: being specific is powerful in attracting clients. Being generic...trying to appeal to everyone...rarely pays off.

## Another way to add value:

Use content not directly related to finance.

For example, it's hurricane season. If your company is located in Florida, write content on hurricane preparedness. Focus not only on personal preparations but also what businesses should do to prepare. This will show you are human. Sound familiar? You will appear relatable and not seen as just a number-crunching tax accountant.

### **#7: Read your content out loud**

You're a writer. Not an actor. So why would you read your content out loud? Quick answer: It will help you identify grammatical mistakes. Added bonus: It will ensure you used the correct tone and voice.

I've found errors when I read my content out loud. Forgetting to make a noun plural or using the wrong there/their/they're. Nothing kills credibility like a type-o.



Reading your content aloud will help humanize your words. Your industry thrives on technical information. Don't get stuck sounding like a robot. Hearing your own voice will allow you to feel what your words say. Ensure that your reader feels what you want them to feel.

Reading your content aloud will make you a better writer. I promise!



Melissa Carraro is an above-average tennis player who writes tax and financial content and copy. She's been playing tennis off-and-on for 20 years and is always looking for a good clay court to practice her backhand.

She grew up in a small town in Indiana. She didn't grow up playing tennis. In fact, her small hometown didn't even have a tennis court. She discovered tennis while studying accounting at Indiana University. She's still searching for a way to incorporate a tennis analogy into her writings. Any suggestions are appreciated!

Melissa has written articles and white papers on:

- International tax economics
- Base erosion & profit shifting (BEPS)
- IRS filing procedures
- Expatriate taxation
- Offshore Voluntary Disclosure Program (OVDP)
- Financial secrecy and tax havens
- And much, much, much more

She also writes website copy, landing pages, and newsletters for accountants, financial advisors, and attorneys.

If you need a copywriter who can take complex financial topics and create easy-to-read content, contact Melissa. And if you play tennis, bonus points!