

B2B Asset Guide: how we build client materials.

How to build client-facing Fintra materials (one-pagers, two-pagers, partner flyers) that look and read like ours: facts rules first, then the brand system, layout lessons and a checklist to run before anything goes out.

September 29, 2026 · Casey Olevsky

01 Facts first

Every claim on a client asset needs a source you can point to. If you can't find one, leave the claim out and flag it to Casey instead of writing around it.

- **Message samples** come from the approved copy doc for that series (for seminars: `2026-07-17_Seminar_campaign_rulings_in.html`), or from the live template. Use them word for word, only swapping in sample names and dates.
- **Hub screens** are rebuilt from a real screenshot of the hub, never from a spec or memory. Match the real labels, statuses, buttons and number formats. If you don't have a screenshot, ask Ashlee or Casey for one from a test account before designing.
- **Stats** (like the 32% conversion rate on the TKG sheet) only when Casey or the reporting gives you the number. No invented percentages, no "up to" numbers.
- **Timing and behavior claims** ("updates within seconds", "texts go to everyone with a phone") get checked against how the system actually works. Two examples from the Seminar Follow-Up v18 that were wrong: the hub syncs replies periodically, not in seconds; and texts require SMS consent, not just a phone number on file.
- **Package and pricing** language only when sales has confirmed it. If it's unknown, say "New from Fintra" rather than naming a tier.
- **Samples must be internally consistent:** the email label, the timeline and the phone dates all have to agree with each other.

When in doubt, the source wins over what would look good on the page.

02 What we never show clients

These come from the client transparency policy (Beau owns exceptions). They apply to every series: Nurture, AfterCare (Grieve Well Live Well), NPS and Seminar Follow-Up.

- **No cadence.** No timelines of when each message goes out, no "3 emails and 5 texts", no "a week out / 3 days out / 2 hours before". Publishing the schedule limits our ability to change it. Describe what the series does, not when.
- **No full verbatim copy.** Two or three rendered samples per series is the limit. A text is its whole message, so show one text and describe the rest.
- **No internal mechanics.** No attribute names, campaign IDs, segment logic, tools (Customer.io, Neon) or branch conditions.
- **No invented features.** If the hub doesn't show it, the asset doesn't show it. Annotations around a screenshot must describe real behavior, and should point at real parts of the screen.
- **SMS consent is always stated.** Texts only go to people who opted in to texts; everyone else gets email. Texts are sent on behalf of Preplan a Funeral and always carry the STOP line.
- **Families never see Fintra.** Client assets can say this; family-facing pieces never mention Fintra at all.

03 Brand system

One font, one palette, one page size. Anything outside this reads as a different company.

TOKEN	HEX	USE
 Forest	#1A3D25	Hero and footer backgrounds, headlines, step circles
 Green	#2F7846	Eyebrow labels, secondary accents
 Lime	#A5B224	Eyebrows on dark backgrounds, check dots, decorative circles at 5 to 7% opacity
 Gold	#CC9E29	The emphasis words in headlines, big numbers, CTAs, the gofintra.com URL
 Cream	#F9F7F2	Alternate section bands, note boxes
 Gray	#6B7280	Body copy
 Dark	#111827	Headlines on white
 Teal	#4A90A4	Extra accent (email tags, reporting)
 Navy	#1B2F5E	Partner accent only

- **Font:** Poppins only (Google Fonts, weights 300 to 900). Not Arial or Helvetica.
- **Type scale:** H1 30 to 34px weight 800, tight letter-spacing; section H2 18 to 21px weight 800; body 10 to 11.5px gray; eyebrows 8 to 9px uppercase, weight 700, wide letter-spacing.
- **Signature headline move:** a plain first half plus a gold second half. Examples: "More Families. More Appointments. **Zero Extra Work.**" and "Every RSVP, **all the way to the door.**"
- **Page size:** 816 x 1056px (US Letter). Two pages max for a sell sheet.
- **Logos:** Fintra logo alone for Fintra assets. Partner assets use a co-branded lockup (partner logo + Fintra logo) and the header line "A Partnership Built to ...".
- **Footer:** gofintra.com in gold on a forest bar, plus the legal line: "For partner use only. Not for public distribution. © 2026 Fintra." (partner versions add the partner name and code).

04 Page structure

Tell a story, most important first. The reader is a busy funeral home owner who will skim, so the first five seconds have to answer: what is it, why do I care, and what do I have to do.

The order that worked for Seminar Follow-Up

1. **Hero (forest):** a benefit headline, not the product name. One or two sentences on the problem and the promise. Three short value points that answer the owner's first questions (for example: nothing to set up, a headcount you can trust, declines become visits).
2. **Numbered chapters (01, 02, 03):** one idea each, with a headline, two or three sentences and one supporting visual. For a series, the chapters are usually: it's branded for you, here's what the family or guest experiences, here's what you see in the hub.
3. **Your part:** one line on what the funeral home actually does. Usually almost nothing, and that is the point.
4. **Built-in safeguards:** consent, opt-out and similar reassurances, in small cards.
5. **CTA bar:** "See it in action." plus gofintra.com, then the legal line.

Layout lessons from the feedback

- **Lead with an overview, not with samples.** Opening on a big email and phone mockup tells the reader nothing about why it matters.
- **Alternate sides.** Chapter 1 has copy on the left and the visual on the right; chapter 2 flips. Identical stacked boxes read as blocky.
- **Use full-width bands, not boxes around everything.** Alternate white and cream bands so sections divide cleanly.
- **Contain everything.** Bullets and small notes live inside a box or right next to the thing they describe. Nothing floats.
- **Group by logic.** When showing replies or options, group them the way the reader thinks (confirm attendance: YES or NO; update party size: a number), not as a flat list.
- **Don't repeat.** If the hero lists three things and the chapters list the same three, cut one. Page 2 should add, not restate page 1.
- **Section labels are polished, not chatty.** "Branded for you", not "A sample of what they'll see". Headings describe what the guest does ("Confirm attendance"), never a question we don't actually ask.

05 Visuals

Visuals are supporting cast for the story, not the story. The reader should get the feel of what the client gets, not read every word.

- **Keep them small.** A sample email or phone should not take up half a page. One visual per chapter is usually enough; five phones on one page is too busy.
- **Phones:** use a real phone shape (rounded corners, notch, status bar, contact header) and crop it: let it run off the bottom edge of its section instead of shrinking it. A short phone with a full bezel looks like a smartwatch; a flat card with no bezel looks like a browser window.
- **One conversation per phone.** Don't combine unrelated messages (for example a welcome text and a guest-count reply) on one screen; it reads as one thread. A back-and-forth that really is one thread (question, reply, confirmation) works well.
- **Emails:** a card with a sender bar, the client's logo, the counselor's signature and photo. Email cards can look like a window; that's accurate.
- **Hub screens:** rebuilt to match a real screenshot (see Facts first). Show enough rows to feel real (4 or 5) and crop the rest.
- **Callout tags** (small white pills with a gold border) point at real features: "Your logo", "Your counselor", "Non-responders stand out". Put them in empty space; never cover content. Don't annotate every row of a list view; annotate features.
- **Sample data:** use the Jarrell Funeral Home sample (counselor Beau Jarrell, guest Margaret) and consistent dates across every visual. Add "Sample names and messages" in the footer.
- **Decorative touches:** low-opacity lime circles in the corners of dark sections, 4px accent bars, gold step numbers. Use sparingly.

06 Copy rules

Confident, warm, peer to peer. Owners should feel this saves them work, not that they're being sold.

- **No em dashes, ever.** Casey reads them as an AI tell. Use a comma, a colon or a new sentence.
- **Frame around the funeral home.** "Your counselor", "your hub", "in your funeral home's name". Avoid Fintra saying "we" about itself.
- **Emphasize ease:** zero extra work, nothing to manage, runs automatically. Always say what the owner's part is.
- **Plain words.** No "marketing automation", no jargon, no aggressive sales language ("crush it", "dominate"), no competitor names.
- **Don't assume the format.** Not every seminar is a lunch: say "order food" or "the meal", not "order lunch".
- **Say the why plainly** when there's no stat to lean on ("Every empty seat is a meal you paid for and a family you didn't get to meet").
- **Phrases that work:** "More Families. More Appointments. Zero Extra Work." · "Everything included. Nothing to manage." · "Families never see Fintra." · "Your counselor's voice, sent automatically." · "See it in action."
- **Keep it short.** Two or three sentences per section; if a sentence needs a second read, cut it.

07 Build and export

Design in HTML, then export to PDF. Document tools produce the flat, "blah" look; HTML gives real layout control.

1. Build one self-contained HTML file: Poppins from Google Fonts, colors as CSS variables, each page an 816 x 1056px block, images embedded as base64.
2. Add print rules so each page exports cleanly: `@page { size: 8.5in 11in; margin: 0 } and print-color-adjust: exact .`
3. Export with Chrome: open the file and Print to PDF with margins set to None and headers and footers off. Or headless: `chrome --headless --print-to-pdf=out.pdf file.html .`
4. **Look at every page of the PDF before sending.** Check for overflow (a footer pushed off the page), text covered by overlapping visuals, clipped messages, and dead space.
5. Send Casey a rendered version for anything that is a redesign. Keep old versions as backups so you can compare.

If you work with Claude, give it this guide, the relevant source doc and a real hub screenshot, and ask it to render and check the PDF itself before handing it back.

08 Reference assets

These live in Casey's Downloads folder; ask him for any you don't have.

ASSET	FILE	WHAT TO TAKE FROM IT
Seminar Follow-Up v3	Seminar-Follow-Up-v3.pdf / .html	The latest structure: owner-first hero, numbered chapters, cropped phones, a hub mock matched to the real screen
TKG x Fintra two-pager	TKGxFintra-Front+Back.pdf / .html	The co-branded partner layout, hero with a stat box, the 4-step journey strip, proof rows with accent bars
Family1 x Fintra two-pager	Family1xFintra-Front+Back_Updated.pdf / .html	Partner version of the same system
Fintra overview one-pager	Fintra-Overview-OnePager.pdf	The generic Fintra-only layout
GWLW AfterCare partner overview	GWLW AfterCare — partner overview (v3).html	How to present a series without giving away cadence or copy: phases, a few samples, safeguards
Client transparency policy	Client transparency policy — what we show, what we hold (working draft).html	The rules in "What we never show clients"
SMS consent requirements	SMS_Compliance_Fintra_tightened.docx	Required consent language and placement

09 Pre-send checklist

- ☐ In five seconds, does the hero answer what it is, why it matters and what the owner has to do?
- ☐ Does every claim trace to a source doc, a real screenshot or Casey?
- ☐ Is there no cadence, no message counts and no more than two or three verbatim samples?
- ☐ Is SMS consent stated wherever texts are mentioned?
- ☐ Do the hub visuals match the real hub screen, with no invented columns, numbers or features?
- ☐ Do the sample names, dates and labels agree across every visual?
- ☐ Are there zero em dashes in the page copy?
- ☐ Is it Poppins only, the brand palette only, and 816 x 1056px pages?
- ☐ Do sections alternate, sit in bands, and keep every bullet inside a box or next to what it describes?
- ☐ Is there a CTA bar with gofintra.com and the legal line?
- ☐ Has every page of the exported PDF been checked for overflow, overlaps and clipped text?