

Explain the service before the promise.

A financial-service brand needs a clear description of its actual work. Begin with the business, audience and permitted scope rather than a general promise of growth.

☐ **Define the entity and service.**

Write down the actual contracting entity, the service being described and the audience it is intended for. Confirm who is authorised to approve these particulars.

☐ **State the boundaries clearly.**

Separate education, marketing support, product information and professional advice. The agency describes its communication services; the client owns its actual financial-service engagement.

☐ **Build one approved information source.**

Keep verified names, contact details, service descriptions and relevant status information in a controlled record. Align website pages, profiles and downloadable materials.

☐ **Use a consistent visual and verbal identity.**

Record the approved logo, palette, layout conventions and plain-language style. Make supporting information legible instead of placing essential detail in decorative artwork.

☐ **Keep the claim proportionate.**

Avoid unsupported superiority, implied guarantees and invented endorsements. A proposed capability, illustrative interface or design sample should not be presented as a completed client result.

REVIEW OWNER / OUTSTANDING EVIDENCE / NEXT ACTION

Starting decision: preserve useful existing assets. A clearer service page or a defined review process may be more appropriate than a full rebrand.

Put a review process behind the message.

Different financial entities and products need different professional reviews. Use the appropriate authorised reviewer before any public communication; a design checklist is not legal approval.

☐ **Map statements to supporting evidence.**

List material product, service, credential and performance-related statements with their source, date, owner and approved wording. Hold unverified statements from publication.

☐ **Give terms and limitations usable space.**

Ask the qualified reviewer which terms, exclusions, risks and status information belong beside the main message. Do not obscure required explanations through tiny type or misleading placement.

☐ **Record approval on the final version.**

Document the reviewer, date, approved audience, channels and exact version. A reviewed draft does not automatically approve a later edit or a different campaign.

☐ **Inspect the whole presentation.**

Review the headline, imagery, captions, forms and destination together. Decorative growth imagery should not be presented as evidence of returns or actual financial performance.

☐ **Assign a correction owner.**

Keep track of changes to products, terms, contacts and required wording. Agree who updates public material and how outdated assets are retired.

REVIEW OWNER / OUTSTANDING EVIDENCE / NEXT ACTION

Publication gate: no placeholder regulator logos, certification badges, client outcomes, return figures or compliance claims. Review the specific business and product scope.

Make the next step appropriate.

A useful enquiry journey asks for relevant context, explains what happens next and reaches the right team. It should not collect account histories or perform financial transactions through a marketing form.

☐ **Match the invitation to the destination.**

Connect educational or service communication to the relevant information page. Keep agency project enquiries separate from the client's financial-service enquiries.

☐ **Minimise the information requested.**

Collect only the contact and context required for the next conversation. Do not request account numbers, identity-document scans, passwords, transaction histories or sensitive financial records in these fields.

☐ **Explain the handling before submission.**

Have the responsible owner approve the purpose, contact route, data-handling notice and retention arrangements. Keep a separate decision for ongoing promotional communication.

☐ **Name the receiving team.**

Specify who receives the enquiry, what information they need and how unsuitable or incomplete requests are handled. Do not imply that submission guarantees eligibility or acceptance.

☐ **Test successful and failed handoffs.**

Test validation, destination links and the actual receipt mechanism. A local draft, click or loading animation is not a confirmed submission, professional consultation or product approval.

REVIEW OWNER / OUTSTANDING EVIDENCE / NEXT ACTION

Operational boundary: the client owns professional advice, suitability decisions, account access, product fulfilment and the actual service experience.

Make responsibility visible.

Trust is supported by accurate information, genuine experience and clear response ownership. A reputation programme is not a promise to manufacture ratings or remove legitimate criticism.

☐ **Use real, authorised proof.**

Publish case studies and interviews only when work, contribution, permissions and statements are verified. Never use a generated person as a real reviewer or client.

☐ **Ask for feedback neutrally.**

Do not purchase reviews, invent quotations or filter requests to solicit only positive public reviews. Keep internal service improvement and public-feedback handling connected.

☐ **Keep private matters private.**

Use an approved private support route for sensitive concerns. Do not expose customer account information or confirm private financial-service relationships in a public response.

☐ **Measure the right stage.**

Distinguish content delivered, relevant enquiries, recorded service handoffs and client-reported outcomes. State sources, periods and attribution limitations; do not infer revenue or returns from traffic.

☐ **Schedule ownership reviews.**

Review asset access, contact accuracy, approval status and unresolved concerns with named owners. Keep the two proof templates unpublished until real evidence and permissions are attached.

REVIEW OWNER / OUTSTANDING EVIDENCE / NEXT ACTION

Final sign-off: verified business particulars, reviewed copy, approved assets, tested contact routes and documented responsibilities. This resource is not financial, regulatory or legal advice.