



21 Apr 2022 23:35



What is your company name?

SmartLifeB2B



Please provide your website link.

www.smartlifeb2b.com



Where is your company based / what areas do you operate in?

United States



What is your company slogan or mission statement?

We help our clients protect their financial futures, build generational wealth, and open doors for the highest allowable tax-deductible contributions for their retirement savings as designed by the federal government. By helping their businesses reduce their tax burden, they're better able to provide for themselves and their employees.



How would you describe your business in one sentence? What is the basic function of your product/service?

We operate in specialized retirement services and insurance products designed for small and medium size businesses.



What is your goal with this content?

Our goal for this content would be threefold. 1) Build a professional branding the grows trust. 2) Offer some high level explanation of the services we provide. The services can be complex so we don't need to go into too great of detail at this point. 3) Present enough benefits and CTA that they will meet with us (if they are looking into after being referred by one of our partners) or to get them to request additional information (CTA). We do a lot of business through referrals and a primary goal is that those who are doing research can use this page to get a sense for who we are, what we do, and why it would benefit them to talk with us.



What are the unique selling points of your company?

For this page/service type... 1) We specialize in the products that allow the highest tax-deductible contributions for small businesses. Most business owners think they can only contribute up to \$27k or \$61k, but we can help them get as much as \$417k tax-deductible each year. This is a massive tax-savings for most of the clients, and allows them to shift their income into retirement. This is a bit complex, and I can explain in greater detail for where these numbers come from. 2) Our retirement plans come with guaranteed income for life. Most of the plans would give the option for the retiree to receive ~\$150k a year, every year, for the rest of their lives, no matter how long they live. 3) The plans are uniquely well designed for individuals who earn significant income as small business owners, especially doctors (\$250k or more). Most of the time, individuals who earn this much become ineligible for other retirement plans, and don't realize they can still use IRS approved tax plans for their retirement. 4) It will often allow a business owner to save more in taxes than they spend on retirement plans. Because of the way the US business and retirement law is configured, a small business owner must pay for

the US business and retirement law is configured, a small business owner must pay for employee retirement if they have a plan for themselves. This will often make it too expensive for a business owner to take advantage of what the IRS encourages them to do. These plans allow them to save more in taxes than they spend on retirement plans. 5) Because of the federally approved tax savings for these plans, the cost can be a net negative. For example, they have a net cost of \$32k, but \$42k gets contributed to their retirement. 6) These plans are guaranteed, not dependent on stock market performance or susceptible to economic down turns. There are others, but I'd want to start with these. As I mentioned, this is a bit complex, so I can also send you some additional information to explain how this works, and what the IRS says about it.



Is there a specific tone of voice you want?

Professional, trustworthy, experienced. Most of the clients we would want to point towards this page will be high earners (\$200k+ annually) who run their own successful businesses or have medical practices.



Which pages do you need copywriting for? Please clearly list.

This will be for a specific product/services page for Cash-Balance Pensions. It is the second half of this page on our current website: <https://www.smartlife2b.com/individualandfamily>



If you need a Products or Services page, please provide additional details:

The services pages will be for Cash-Balance Retirement Plans. These are retirement plans that are designed for (very) annual high contribution limits (up to \$417k depending on age of the applicant), guaranteed income for life, significant IRS approved tax-deductions for small business owners and doctors, and do not limit contribution based on income. I'm not sure how familiar you are with US retirement plans (401k, IRAs, Roths, etc.) but basically, this is one of those. The biggest difference is the amount of tax-deduction you can get for these plans as approved by the IRS.



Who is your target audience?

For this one, our primary target would be doctors.



Do you want the content to be written in US English or UK English?

US English please



Please share website links to your competitors/websites where you like their style of writing:

I've included these in the Fiverr post, and will add a few additional attachments there as well from federally insured companies that provide these options.



Are there any more details you would like to share regarding this project? Please add your thoughts below:

Nothing beyond what has been included above. Our hope would be to have many more of these types of pages, but this is our first to test its response with our clients.



Please feel free to upload any supplemental documents here (up to 10 MB):

📎 Pensions_Info_Documen....zip

