RETIREMENT TAX BILL CUSTOMIZATION GUIDE

This guide will take you through all the customization elements of the RTB tool.

Before You Begin

Customizing your RTB page helps create a familiar experience for clients who already know your brand while preserving the clear, effective Retirement Tax Bill message and call to action.

Before completing the order form, use this guide to gather the information you'll need. If you're unsure about colors, images, videos, disclosures, or wording, we're here to help.

For assistance, contact Laura Deignan at Support@StonewoodFinancial.com. The Stonewood team can answer your questions, provide guidance, and help ensure your customization process is smooth and efficient.

What Stonewood Handles

After we receive your payment and completed customization preferences, Stonewood takes care of the rest. Our team manages the coding, testing, and implementation while ensuring your approved branding and assets are incorporated correctly.

Most customizations are completed within **five business days** after payment and receipt of all required customization details.

Customization Checklist

The sections below follow the same order you'll see on the customization form, making it easy to gather the information and assets you'll need before getting started.

☐ Brand Colors

Your brand colors do more than make the page look attractive; they help create a seamless experience that reflects your firm's identity.

We'll ask you to provide a **primary** and **secondary** brand color. These colors will be used throughout your Retirement Tax Bill page for elements such as buttons, accents, highlights, and other visual components to ensure the page feels like a natural extension of your brand.

The best color formats are **HEX, RGB**, or **HSL**. If you don't know your exact color codes, don't worry. Simply upload your logo, and we'll identify your brand colors and confirm them with you before applying them. You can also provide your website URL, logo file, or brand guide, and the Stonewood team will help determine the appropriate colors.

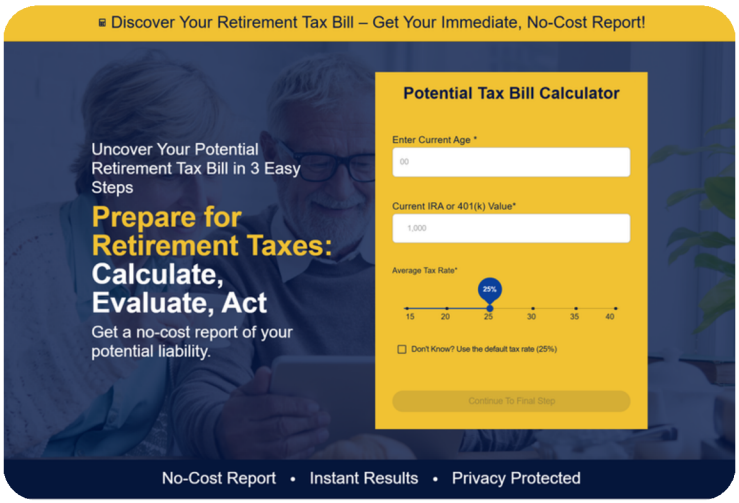
What to provide

☐ **Primary color:** the main color you want used for buttons, headings, and key brand accents.

☐ **Secondary color:** a supporting color used for contrast, accents, or additional visual emphasis.

Visual Reference

Generic





Customized





☐ Hero Image

The hero image is one of the first things a visitor sees. It sets the tone before they read a single line of copy.

You can keep the current image or replace it with one that better reflects your practice, your market, or the campaign you're promoting. This is a good place to make the page feel more local, more personal, or more aligned with your firm's visual style.

What to provide

☐ Preferred image or graphic file.

☐ Any special crop, placement, or focal-point instructions.

☐ Optional visual direction, such as specific ethnicity, professional, local, advisor-focused, family-oriented, policy-focused, or tax-planning-focused.

Visual Reference (Background Image and Color Overlay)





Video

A video allows you to personally connect with visitors and reinforce the value of the Retirement Tax Bill conversation. It's an opportunity to introduce yourself, explain why this topic matters, and encourage prospects to take the next step with your firm.

You can keep the default video or replace it with your own welcome, educational, or introductory video that best reflects your message and brand.

What to provide

□ An MP4 video file, YouTube video link, or Vimeo video link.

Visual Reference





Potential Tax Bill Calculator Form

The calculator is where interest can turn into action. The form should collect enough information to support follow-up without creating unnecessary friction.

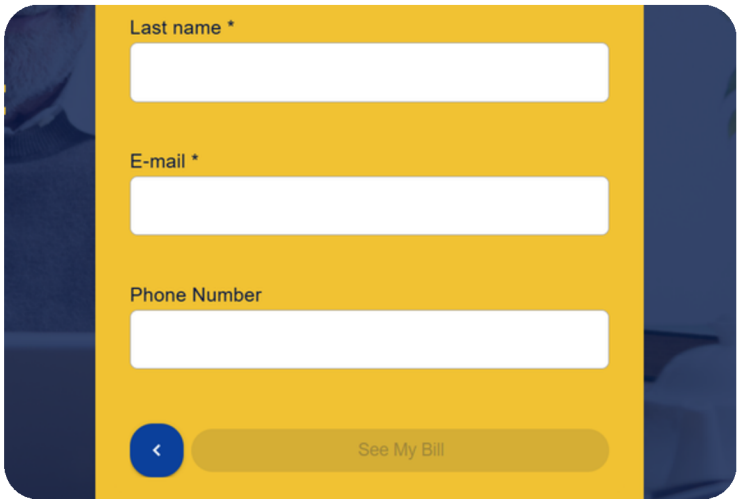
The primary customization in this section is the **phone number** field. You can choose whether prospects are required to provide their phone number or whether it will be optional. There's no right or wrong approach. The best option depends on your firm's follow-up process, lead qualification strategy, and how much information you want to collect before providing the Retirement Tax Bill report.

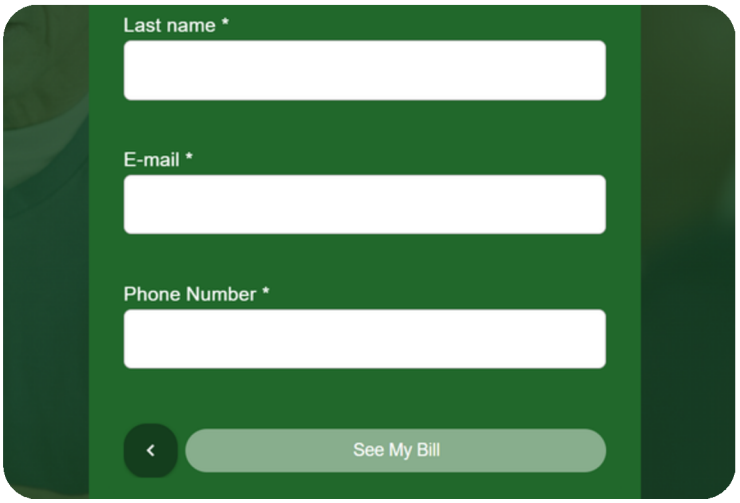
What to provide

□ **Required:** Best when phone follow-up is a core part of your process.

□ **Optional:** Best when you want to reduce friction and make the form feel easier to complete.

Visual Reference





□ Follow-Up Email Content

The follow-up email is where the conversation continues. By this point, your prospect has already expressed interest, so the email should clearly guide them to the next step.

You can customize the email to reflect your voice, include practice-specific links, and guide prospects toward the action you want them to take.

As you review your email, ask yourself: **What do I want the prospect to do next?** Whether it's scheduling a consultation, replying to the email, registering for an event, downloading a resource, or visiting your website, make your call to action clear, simple, and easy to follow.

What to provide

□ Preferred email copy or edits to the existing email.

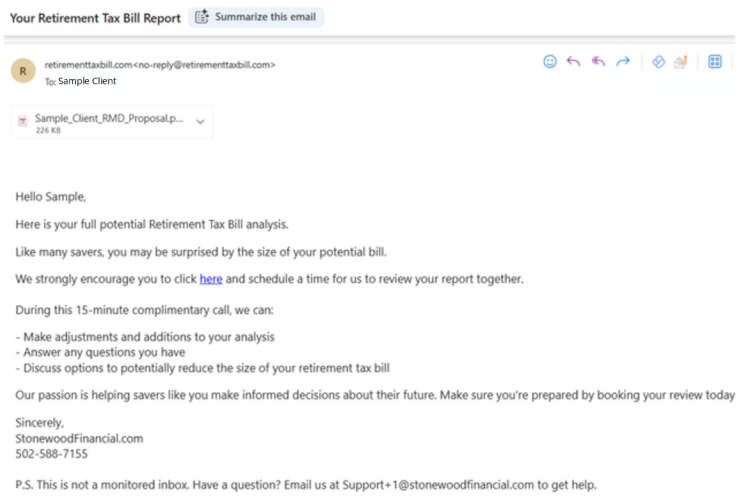
□ If you would like to include the attached PDF report or not.

□ Links you want included, such as your website, scheduling page, webinar page, or resource page.

□ Practice details, advisor name, team name, office location, or contact information to include.

□ Any compliance-approved disclosure language required for the email.

Visual Reference (Generic Email vs. Custom Email)


Your Retirement Tax Bill Report Summarize this email

retirementtaxbill.com<no-reply@retirementtaxbill.com>
To: Sample Client

Sample_Client_RMD_Proposal.p...
226 KB

Hello Sample,

Here is your full potential Retirement Tax Bill analysis.

Like many savers, you may be surprised by the size of your potential bill.

We strongly encourage you to click here and schedule a time for us to review your report together.

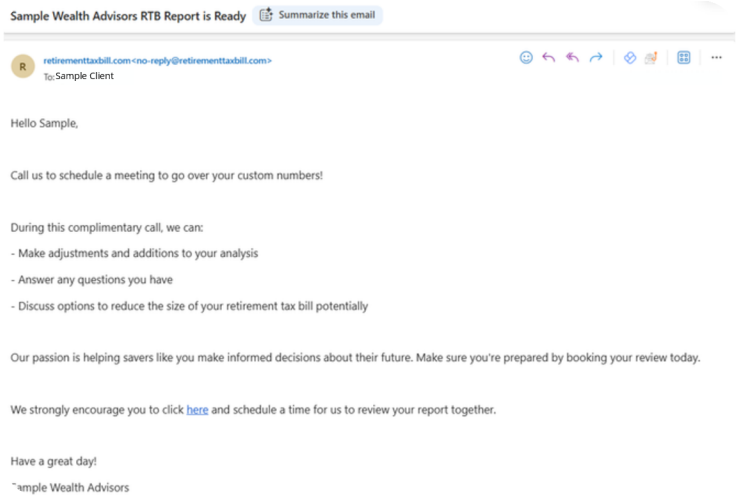
During this 15-minute complimentary call, we can:

- Make adjustments and additions to your analysis
- Answer any questions you have
- Discuss options to potentially reduce the size of your retirement tax bill

Our passion is helping savers like you make informed decisions about their future. Make sure you're prepared by booking your review today

Sincerely,
StonewoodFinancial.com
502-588-7155

P.S. This is not a monitored inbox. Have a question? Email us at Support+1@stonewoodfinancial.com to get help.


Sample Wealth Advisors RTB Report is Ready Summarize this email

retirementtaxbill.com<no-reply@retirementtaxbill.com>
To: Sample Client

Hello Sample,

Call us to schedule a meeting to go over your custom numbers!

During this complimentary call, we can:

- Make adjustments and additions to your analysis
- Answer any questions you have
- Discuss options to reduce the size of your retirement tax bill potentially

Our passion is helping savers like you make informed decisions about their future. Make sure you're prepared by booking your review today.

We strongly encourage you to click here and schedule a time for us to review your report together.

Have a great day!

ample Wealth Advisors

☐ Compliance Review

The landing page should be reviewed and approved by your firm's compliance department before it is published.

In addition to customizing colors, images, videos, and form settings, you may also request compliance-related updates to the page content. This can include copy revisions, practice-specific information, required disclosures, or other compliance language needed to meet your firm's standards.

What to provide

☐ Specific landing page copy edits.

☐ Advisor or practice details to include.

☐ Disclosure text to add to the page.

☐ Any compliance comments or special restrictions Stonewood should be aware of.

Ready to Submit Your Customization?

Before submitting your order form, make sure you have gathered the key items below. Complete information helps Stonewood move faster and reduces wait time.

- ☐ **Primary and secondary colors, or a website/brand guide Stonewood can reference.**
- ☐ **Hero image selection or notes about the visual direction you want.**
- ☐ **Video file or video link in MP4, YouTube, or Vimeo format.**
- ☐ **Phone number field preference: required or optional.**
- ☐ **Email copy edits, links, contact details, and disclosures.**
- ☐ **Compliance reviewed and needed disclaimers or disclosures**

Need More Assistance?

If you are not sure what to choose, reach out before submitting. Stonewood can help you think through the options, identify the right assets, and make sure the customization direction is clear. Email Support@StonewoodFinancial.com.