



# Newsletter Editorial Guide

version 2.0

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## What We're Doing

*Shrewd Investor* is not a person. It's a **perspective**—like *The Economist* or *The Federalist Papers*. Every newsletter, regardless of who writes it, must carry the same voice:

👉 A wealthy, thoughtful investor who's talking to a curious friend trying to make sense of money.

This isn't about stock picks. It's about mental models, tax hacks, smart structures, and thinking a few steps ahead of Wall Street. Your job is to **show the reader how the game is played—and how to win without cheating.**

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## The Two Editions

### 1. Tuesday Deep Dive

These are timeless insights about how money really works for the rich and strategic. They should feel like you just sat down with a rich uncle who showed you the playbook no one else talks about.

#### **What to write about:**

- Little-known tax or estate strategies (e.g., DSTs, QSBS, cost segregation)
- Unique structures or wrappers (e.g., family offices, private placement life insurance)
- Psychology of wealth-building

- Long-term positioning strategies
- “What wealthy people *actually* do” behind closed doors

### **What to focus on:**

- A clear *lesson* that feels useful and rare
- Real-world metaphors or mental pictures
- A takeaway that leaves the reader feeling **smarter and more confident**

## **2. Thursday Tactical Update**

These are time-sensitive market narratives. Think of it as your friend texting: “What’s going on with Ethereum?” or “Is this inflation number good or bad?” You reply with a quick analysis and a chart that makes sense of it.

### **What to write about:**

- Rotation into or out of asset classes
- Technical setups (e.g., golden crosses, base breakouts)
- Risk-on/risk-off sentiment shifts
- Opportunities in ignored corners of the market
- Tactics for current season (e.g., how to invest in a rising rate environment)

### **What to focus on:**

- Where we are in the cycle
- The narrative behind the chart
- “What to watch next” or “What’s the play?”



## **How to Think About Content**

### **1. You’re not selling hope—you’re explaining reality.**

Always ground the story in facts, frameworks, and decisions. If something is speculative, say so.

## **2. Paint pictures, don't write lectures.**

Use analogy, metaphor, and visual language. If you can turn a financial concept into a parable or a story, do it.

## **3. Clarity is king.**

Avoid jargon. Speak plainly. Remember: you're writing to a smart layperson who wants clarity, not complexity.

## **4. Always answer the silent question:**

“What does this mean for me?”

Bring it back to the reader's situation, mindset, or action step.

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## **Writing Checklist**

Before submitting a draft, ask:

- Did I teach the reader something they'd never hear from a financial advisor?
  - Did I make the abstract feel concrete through examples or metaphors?
  - Is the voice consistent with a confident, kind, and strategic investor?
  - Did I make this feel relevant—either timeless or timely?
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## **Topics That Work**

Category	Examples
<b>Financial Planning Hacks</b> <b>Tricks the Wealthy Use</b>	"Why rich people love Delaware LLCs" / "How a DST makes your tax bill disappear"
<b>Market News</b>	Why everyone is sleeping on small caps
<b>Investment Opportunities</b> <b>Market Alerts</b>	"How farmland beat the S&P over 30 years" / "Ethereum's big box setup"

## Formatting Reminders

- **Tuesdays:** 700–900 words
- **Thursdays:** 400–600 words
- **Structure:**
  - **Lightning Round** - 3-5 bullets outlining the key ideas
  - **Hook** - story, image, contrarian stat
  - **Insight** - teach the thing or tell the story
  - **Takeaway** - tie it up
  - **CTA** - product, lead magnet or share request
- **Visuals:** Include relevant chart, graph, or custom diagram whenever possible. Show, don't tell.

## Final Thoughts

Write each edition like you're writing to one person who *wants to believe the system can work for them too*.

Give them the clarity to act, the structure to plan, and the confidence to stop outsourcing their financial life.

*Be clear. Be clever. Be shrewd.*