

CuratedRisk Solutions

Revised DesignCrowd Brief - Logo, Branding, Business Card, Letterhead & Envelope

Primary instruction: Use CuratedRisk Solutions as the public-facing brand name. CuratedRisk is one word. Legal entity is Curated Risk, LLC.

1. Project Overview

We are launching a professional insurance and risk-management business under the public-facing brand name CuratedRisk Solutions. The legal entity is Curated Risk, LLC, and the business will operate using the DBA / brand name CuratedRisk Solutions.

This project is for a complete foundational launch identity package, not a large corporate rebrand. The finished design should be polished, credible, professional, and appropriate for clients, referral partners, insurance carriers, and compliance review.

2. Exact Naming Instructions

Legal entity name	Curated Risk, LLC
Public-facing DBA / brand name	CuratedRisk Solutions
Logo name to use	CuratedRisk Solutions
Critical spelling instruction	CuratedRisk should be treated as one word. Do not separate it as Curated Risk Solutions in the logo unless showing the legal entity name in small disclosure text.

3. Business Description for Branding

CuratedRisk Solutions is an independent insurance and risk-management practice focused on helping individuals, families, professionals, retirees, and business owners make clearer, more thoughtful decisions about protection planning.

The firm may offer or coordinate access to insurance-based solutions including property and casualty insurance, health insurance, Medicare-related insurance, life insurance, disability insurance, long-term care insurance, fixed annuity solutions, and general insurance/risk-management consulting.

The business should be positioned as professional, consultative, relationship-driven, and organized - not as a transactional online insurance agency. The brand should communicate that we help clients evaluate and curate protection solutions based on their specific circumstances.

4. Compliance and Licensing Positioning

- CuratedRisk Solutions is an insurance and risk-management business. It is not a securities broker-dealer, investment advisory firm, asset manager, securities transaction platform, or wealth-management firm.
- The branding should not imply securities trading, portfolio management, investment advisory services, stock market transactions, or broker-dealer activity.
- CuratedRisk Solutions may only solicit or conduct insurance business in states where it and/or its licensed producers are properly licensed. The website, letterhead, business card, envelope, and marketing layouts should allow space for appropriate licensing and compliance disclosures.
- Final compliance wording may be revised by legal or compliance counsel, but the design should anticipate disclosure space in footers or small-print areas.

5. Brand Personality and Design Direction

Professional, Trustworthy, Established, Clean, Modern, Calm, Intelligent, Conservative but not outdated, Premium but approachable, Independent and objective, Clear and easy to understand.

Avoid designs that feel gimmicky, flashy, cartoonish, overly tech-focused, overly aggressive, or like a cheap template. A shield, compass, pathway, layered-protection concept, abstract CR mark, or clean geometric identity may work if executed in a refined and original way.

6. Tagline Direction

Preferred tagline	Protection, Thoughtfully Selected
Optional headline / campaign line	Your Future. Protected.

7. Requested Deliverables

- Primary logo for CuratedRisk Solutions
- Horizontal logo version
- Stacked logo version
- Icon / mark-only version
- Black-and-white version
- Reversed / white logo version for dark backgrounds
- Transparent PNG files
- Vector files: AI, EPS, SVG, PDF
- Brand color palette with HEX codes
- Typography recommendations
- Basic one-page brand style guide
- Business card design
- Letterhead design with disclosure/footer area
- Envelope design
- Email signature concept if included in the package
- Simple signature-friendly logo layout if included in the package

8. Preferred Color Direction

Suggested palette direction: deep navy, charcoal, slate blue, steel blue, white, light gray, soft silver, and possibly a restrained muted green or gold accent. The palette should feel appropriate for a professional insurance and risk-management firm.

9. Business Card, Letterhead, and Envelope Requirements

- Business card should include logo, name, title, phone, email, website, and appropriate insurance/risk-management positioning.
- Letterhead should include logo, company name, address/contact information, website, and a clean footer/disclosure area for licensing and compliance language.
- Envelope should be clean, professional, and consistent with the logo, colors, and typography. It should be suitable for client correspondence and carrier communications.

10. Disclosure Space Example

Design should allow room for a footer disclosure such as:

CuratedRisk Solutions is an insurance and risk-management business. Insurance products and services are offered only in states where CuratedRisk Solutions and/or its licensed producers are properly licensed. CuratedRisk Solutions does not provide securities brokerage or investment advisory services.

11. Overall Goal

The finished brand should make CuratedRisk Solutions look serious, trustworthy, well-organized, and refined from day one. It should be credible enough for successful individuals, families, retirees, business owners, referral partners, and insurance carriers, while staying appropriately scaled for a professional affiliated business rather than an oversized Fortune 500-style branding campaign.