

# The Baratelli Brief

*Practitioner analysis for principals, family offices, CPAs, attorneys, and investors*

SPECIAL BRIEF

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[baratelliinstitute.com](http://baratelliinstitute.com)

## Publications as Product

*What changes when the guide is the deliverable, not the lead-in.*

*Most professional-services publications are written to attract a conversation. The Baratelli Institute is built the other way. The publication is the product. This Brief lays out what that means for the reader who buys one — what it changes about the length, the editing, the pricing, the tools that ship alongside, and what the reader walks away with when the cover closes.*

We put this Brief together because the question comes up. A reader picks up a 400-page family-office reference at \$349 and asks the reasonable question: why is this guide shaped like this? The answer is the framing on the next page. The guide is the deliverable. Everything that follows is the consequence of that one choice.

### In this Brief

1. Two ways to publish — the default posture, and the Institute's posture
2. What publication-as-product means for the work — length, editing, pricing, tools, workbooks
3. What it means for the reader who opens the guide
4. Why the library is priced the way it is
5. How to use the library — flagships, mid-tier, free hub, tools, Money Reality, Decide. Act. Now.

## Two ways to publish

Professional-services publishing tends to follow one of two operating postures. Both are correct for the firms that operate them. They are different shapes, and they produce different things on the page.

### **The default posture: publish to attract a conversation**

In the default posture, the publication is a marketing surface. It exists to attract attention that funnels into a service. The service is the revenue. The publication itself can stay thin — in fact, the structural incentive is for it to stay thin, because the reader who arrived at the full answer inside the PDF would have no reason to call. So the publication takes the reader close to the answer, sketches the framework, and then ends with a clear next step: schedule a call, request a meeting, talk to one of our partners. That is correct design for a firm whose revenue lives in the engagement that follows.

### **The Institute's posture: the publication is the product**

The Baratelli Institute is built the other way. The guide is the deliverable. The reader who pays for a guide receives the full work for the price they paid. There is no downstream service the publication is selling them into. There is no call to schedule at the end. The reference itself is what was purchased, and the reference is what shows up on the reader's screen.

Everything that looks different about the Institute's library — the page counts, the committee review on every flagship, the tool layer, the workbooks, the pricing — follows from that one choice. When the publication is the product, the publication has to actually do the work, not gesture at it. The rest of this Brief walks through what that looks like in practice.

#### **A NOTE ON THE FRAMING**

The contrast is not a critique. Both postures are correct for the firms that operate them. The Institute simply operates the other way, and a reader buying a guide deserves to know which shape they are buying.

## What it means for the work

When the publication is the product, the publication has to be complete. Complete is not a slogan — it is a working constraint that produces specific consequences on the page. Five of them follow.

### Length

The practitioner flagships run 200, 300, 400 pages and more. The length is not virtue; it is what complete requires. A family-office reference that covers governance, investment policy, tax architecture, trust structures, succession, and operations cannot be done well in forty pages. A CFO reference that covers the 13-week cash forecast, covenant compliance, the close, the audit, the board pack, and capital-markets work cannot be done well at brochure length. The page count is the honest answer to the scope of the work.

### Editing discipline

Every flagship goes through committee review before publish. Source-script versioning means every figure on every page can be traced back to the script that produced it. Floor-to-Sheet reconciliation routes findings from live deal work back into the guides, so the reference stays current with what shows up in actual practice. The reason for the discipline is direct: the reader sits down with a client tomorrow morning and the reference has to hold up at the table.

### Pricing

Mid-tier references are \$149. Practitioner flagships are \$349. The price is what the publication is worth, not what a marketing surface would set. A marketing surface is priced at zero because the publication is not the product; the call is the product. The Institute's guides are priced because the guide is the product.

### Tools

Over 100 interactive tools live on baratelliinstitute.com at no cost. They are tagged to specific guides and chapters — a QSBS calculator next to the QSBS chapter, a 13-week cash model next to the cash-forecast section, an ABLE-vs-SNT layering tool next to the special-needs trust discussion. The tools live alongside the guides because the work the publication describes is the work the tool runs.

### Workbook companion

Practitioner guides ship with an Excel workbook tied to specific chapters. The workbook is the working file the practitioner uses on their own engagement; the guide is the manual for using it. The two ship together because they are two halves of the same deliverable. The reader is not asked to rebuild what the author already built.

## What it means for the reader

What changes when you open a guide that is the product rather than the lead-in? Four practical things.

### **You can use it on your own client tomorrow morning**

The work is in the pages you bought. There is no missing piece held back behind a paywall, no chapter that ends with “contact us to learn more,” no methodology gated by an engagement. The reference is the reference. You read it tonight and you can carry it into the meeting in the morning.

### **You can hand it to an associate as reference material**

The guide holds up at the associate's desk because it was built to be referred to, not just read. Chapters are scoped to the question they answer. Citations point to primary sources. Worked examples are complete. An associate who is handed the guide and a task can do the task; they are not handed a teaser and asked to figure out the rest.

### **You can compare what is on the page to what an existing advisor told you**

If the guide says one thing and the advice you were given says another, you have something concrete to ask about. The comparison is reproducible because the methodology is on the page. That is what a working reference is for — not to replace an advisor, but to give the reader the vocabulary and the framework to have the next conversation on equal footing.

### **You end the read with the work in hand**

When the last page closes, the reader does not end with “okay, now I need to hire someone.” The reader ends with the work. The reference is on the shelf, the workbook is on the desktop, the tool is bookmarked in the browser. The transaction is complete. If a question comes up later that the reference does not cover, the next guide is the next guide — sold the same way, shaped the same way, the next deliverable.

#### **THE READER'S BARGAIN**

We put this together as a complete reference. The point is not that the reader will never need an advisor again. The point is that the reader who buys the guide bought the guide.

## Why this is priced the way it is

Pricing follows from the product shape. The Institute's library is sized to compare with the commercial practitioner references — the hardcover and PDF reference works that sit on a CPA's desk, an attorney's shelf, a family-office principal's reading stack. It is not sized to compare with marketing PDFs, which are priced at zero because their job is to bring the reader to a sales conversation. Those are different categories of object, and they live in different price bands for a reason.

A 400-page family-office reference at \$349 is closer to a commercial practitioner reference price than to a marketing PDF price. A mid-tier reference at \$149 is closer to a practitioner handbook than to a content download. The pricing is honest about what the work is.

A workbook layer at no additional cost is more than most commercial references include. A tool layer of more than a hundred interactive utilities, indexed to the guides, at no cost, is also more than most commercial references include. The Institute does not charge for these because they are part of the deliverable; the work the guide describes is the work the tool runs and the workbook holds.

### THE PRICING LOGIC

The publication is the product, so the publication is what the reader is paying for. The price is what the work is worth.

A reasonable question a reader can ask is: if the guide is the product, why not price higher? The answer is that the Institute serves practitioners, principals, and the next generation of operators. The price has to clear the hurdle of “can a working CPA, a junior associate, an early-career CFO, a family-office staffer, a graduate student of the family's affairs actually buy this on their own.” The \$149 and \$349 tiers are set with that reader in mind. The price is honest in both directions.

## How to use the library

The library has a small number of shapes, each built for a different working purpose. Here is the tour.

### Practitioner flagships (\$349)

The deep references — Family Office, Private Equity, CFO, Tax, Trust Administration, EPD. 300 to 400+ pages each. Committee-reviewed. Source-script-versioned. Built to be the reference the practitioner reaches for first when the question is hard. Each ships with a workbook and is indexed to the tools on baratelliinstitute.com.

### Mid-tier references (\$149)

Focused references on specific working problems — complete in scope on the question they cover, lighter in page count than the flagships because the scope is narrower. Same editing discipline, same tool indexing, same shape.

### Free hub at baratelliinstitute.com

Over 100 interactive tools, the Brief and Field Note archive, the founding theses, and the Institute's educational calculators. Free because the tools are not the product — the guides are. The tools exist to serve the guides and to let any reader run a quick calculation without buying anything.

### Money Reality series — the rising generation

Short-form, accessible volumes written for the next generation of operators and principals. The shape is different from the flagships — written for a reader earlier in the journey, in plainer prose — but the posture is the same. The book is the deliverable.

### Decide. Act. Now. — the standalone motivational volume

The one volume in the library that is not a practitioner reference. A motivational work in Phil's direct voice about closing the gap between knowing and doing. It sits alongside the technical library as the one volume aimed at the reader who already knows what to do.

#### HOW TO BUY

Each guide is sold à la carte on Gumroad. No bundles, no “buy three save X.” The library is built to compose on the shelf, not to upsell at checkout. Each strong on its own. Properly led together, unstoppable. Buy one and stop. Or buy the three that match your week.

## A note in close

We put this together as a complete reference. If the guide helps with the work in front of you, that is the point. If you want the next chapter of your work, the next guide is the next guide — same posture, same shape, same bargain. The library is here when you need it.

Thank you for reading. Thank you for buying. The work is the assertion; we will keep our part of the bargain by making the work right.

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### — from the desk at the Baratelli Institute

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