

~~~~~

## Investment Writing Update

*Writing that's an investment in your success*

March 2007

~~~~~

### in this issue

- PR tips for investment advisors
- Insights into ethical investing
- What book about writing belongs in your library?
- "Smarter Surfing: Better Use of Your Web Time"
- Using LinkedIn better
- Unexpected goat cheese
- You can spice up your investment commentary

### PR tips for investment advisors

~~~~~

Thank you, if you were among the participants in Q&A with PR expert Beth Chapman of Ink & Air. If you didn't get a chance to ask Beth a question, you can still benefit from skimming [her posts on my SusanCFA blog](#).

For more of Beth Chapman's wisdom, sign up for her FREE monthly MediaStar e-newsletter loaded with PR tips and insights for financial professionals! Each month she takes you through the steps needed to develop an effective media marketing campaign. Go to <http://www.inkair.com> and enter your e-mail address.

Can you suggest names or topics for future guest bloggers? Please email or call me with your ideas.

### Insights into ethical investing

~~~~~

"Want better returns? Don't just buy good companies. Sell bad ones." That's the teaser for "The Ethics of Shorting," a February *Christian Science Monitor* [videocast and podcast](#) on socially responsible investing. (Look for it in the *Monitor's* monthly outlook archives farther down the web page after the March outlook goes online).

You can [subscribe to the Monitor's e-newsletter on ethics](#). The newsletter also covers ethical topics outside the investment world. For example: an editorial on "Business ethics and the bottom line: Business schools are busily adding ethics training, but how much will it translate into the real world?"

Damon Barglow of Eastern Investment Advisors, who's one of the two speakers on "Ethics of Shorting," runs the [ESG Alpha website](#). ESG stands for Environmental, Social and Governance. The website focuses on socially responsible investing with the goal of providing, in his words:

- General information on hedge funds and other alternative investments for institutions and individuals interested in ESG investing
- Running commentary on the area via my blog
- A quarterly update on the ESG/SRI market

- Links to ESG hedge funds, other innovative investment options and relevant research

Damon told me, "I started the site out of a concern that, despite the fact that alternatives now make up 10% or more of typical institutional and HNW portfolios, SRI investors have little or no alternative exposure. Given the attractive risk-adjusted returns these classes can generate if used properly, there is a strong argument to be made for including SRI hedge funds and other alternatives as part of the overall asset allocation. I hope the site will, at a minimum, generate some discussion/debate about the class within the SRI community."

### **What book about writing belongs in your library?**

~~~~~

Find the name of a [great book that will boost your editing skill](#) on my Susan Ghostwriter blog.

### **"Smarter Surfing: Better Use of Your Web Time"**

~~~~~

You're bound to pick up some useful web surfing tips if you visit Sree Sreenivasan's web page on "[Smarter Surfing: Better Use of Your Web Time](#)."

For example, the page includes a link to "[Better Googling: Things You Didn't Know Google Does](#)."

### **Using LinkedIn better**

~~~~~

If you use the social networking site LinkedIn, you may benefit from the article "[Ten Ways to Use LinkedIn](#)" by Guy Kawasaki.

### **Unexpected goat cheese**

~~~~~

If you're like me, you associate goat cheese with a soft, easily spread substance that comes in a plastic-wrapped log. I was surprised to discover two tasty, semi-firm goat cheeses at a wine and cheese tasting run by the local Wharton Club. My new favorite is North Stone cheese from [Twig Farm](#) in Cornwall, Vermont. One of the owners of Twig Farm is a former cheese buyer for [Formaggio](#). Unfortunately, Formaggio is currently out of this cheese. It may not appear again until "goat season" in the fall, after it's made from summer milk, according to the Formaggio clerk. I'm going to put a tickler in my calendar.

Meanwhile, if you'd like a simple rule for cheese and wine pairings, use products that are created from milk and grapes of the same region. It works because they both are grown in that region's soil.

### **You can spice up your investment commentary**

~~~~~

The [CFA Institute](#), granting body of the Chartered Financial Advisor designation, has granted me membership in their Speaker Retainer Program based on my presentation, "How to Write Investment Commentary People Will Read."

In my presentation I cover how to:

- Personalize your commentary for your client
- Make your commentary provocative, well-written, and properly laid out

I can write commentary your clients will want to read or train your firm's writers. Call me about taking a new look at how you can do a better job of reaching your audiences.

P.S. One of my clients says, "**Susan provided ideas of how to position our firm,** who to talk to, how to send the message, and how to tell the message. It was quite useful not only in terms of helping us spread the message of our firm, but the message of our clients as well."

P.P.S. I'm happy to report I'm getting **published for the first time in [Bottom Line Personal](#)**. I don't know yet when my interview with investment newsletter expert Mark Hulbert will run.

### Quick Links...

~~~~~

- [Susan Weiner Investment Writing Website](#)
- [Investment blog by Susan](#)
- [Marketing and communications blog by Susan](#)

### Contact Information

~~~~~

email: [newsletter@investmentwriting.com](mailto:newsletter@investmentwriting.com)

phone: 617-969-4509

web: <http://www.investmentwriting.com>

~~~~~

Powered by

