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# Investment Writing Update

*Writing that's an investment in your success*

**April 2007**

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## **Secrets of networking**

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"[Three 'Secrets' to a Successful Networking Event](#)" by Paul McCord can help you use your time better at your next networking event. I especially like his tip about putting cards of people who are more interesting contacts in a separate pocket.

If you're in the investment business, read "[Getting the Biggest Bang for Your Buck at Conferences](#)" from the newsletter of the Association of Investment Management Sales Executives. I based it on interviews with three veteran conference-goers.

## **Writing mistakes to avoid**

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The [three biggest mistakes of website writing](#) are:

- Using language that's too formal
- "Selling" too fast
- Focusing on me-me-me

That's according to Daphne Gray-Grant, who elaborates on these points in her article. I recommend subscribing to [her short, snappy newsletter](#) . I must thank copywriter [Steve Slaunwhite](#) for pointing me to Gray-Grant's article.

## **Trends in wealth management M&A**

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Why might an acquirer pay a premium to buy your wealth management firm? Elizabeth Nesvold, managing director of [Cambridge International Partners](#), an M&A advisory firm, listed your:

- Brand identity
- Breadth and depth of client relationships
- Access to full range of products
- Comprehensive service offering
- Developed marketing capability
- Clear management structure
- Competitive incentive scheme
- Scalability via processes and technology

- Profitability, profitability, profitability

Nesvold made these comments in her April 2 presentation to the Boston Security Analysts Society on "Evolution (or Revolution?) of the Wealth Management Industry."

Nesvold made an interesting observation about [client retention in wealth management mergers](#).

**Speaking at CFA Society of Washington, D.C.**

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I'm scheduled to speak on "How to Write Investment Commentary that People Will Read" to the CFA Society of Washington, D.C. on May 3. I hope to see you there, if that location is convenient for you.

P.S. **Interested in how other firms raise assets?** You can [listen to presentations by leading asset managers](#).

P.P.S. One of my clients says about me, "**Her ability to take a subject matter, to really interview people, and then put together valuable content that then we can share with the advisor community, has been terrific.** We can then repackage and utilize her text on our Web site, as well as other communication pieces to the advisor community."

**Quick Links...**

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

**Contact Information**

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