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# Investment Writing Update

***Writing that's an investment in your success***

**October 2007**

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Is your investment commentary too simple?

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Has the industry gone too far in dumbing down its investment commentary? Some portfolio managers fear that marketing consultants are pushing them to talk down to their clients. Marketers are urging more basic vocabulary, shorter sentences, and more white space.

I believe you can't lose by increasing the clarity and visual appeal of your investment commentary. Even the savviest and most erudite of your clients are pressed for time. They're more likely to read commentary that's easy to skim and digest.

Look at the *Wall Street Journal*. It follows much of the marketers' advice. Yet even investment professionals find value in the *Journal*.

There are some limits to how lowbrow you can go. Research suggests that readers' attention drops when sentences exceed 14 words. I cannot keep every sentence that short. Not when I need to explain complicated financial concepts.

Do you think most investment commentary for clients is too dumb? Just right? Over the head of most readers? You can [answer my survey anonymously](#).

## **Tidbits from P&I MegaManagers webcast**

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Some interesting opinions from Roger Urwin, Global Head of Investment Consulting, Watson Wyatt Worldwide speaking on P&I's MegaManagers webcast on October 9:

- The top 20 managers have achieved business success--but not necessarily performance--through product proliferation
- Clients are more willing to hire mid-size or even small managers
- Fees for alternative investments are too high and will come under pressure
- Corporate plan sponsors' (especially sponsors of fully funded plans) appetite for risk will decline over the next five to 10 years, resulting in smaller equity allocations
- 130-30 products can't replace hedge funds because hedge funds are based on maximum freedom

You can [listen to the entire webcast](#) until January 8, 2008

"Focus on your client" and other writing tips

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According to copywriter Jonathan Kranz, "We think we can distinguish our business from the competition by talking about ourselves: our company, our mission, our philosophy, our products. Yet the more we talk about ourselves, ironically, the more we sound like everyone else.... And we lose potential customers as a result."

Instead, put yourself in your client's shoes. You can learn more in "[Make Every Word Count: Q&A With Jonathan Kranz](#)" at MarketingProfs.com.

**Two useful websites for travelers**

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If you've got a laptop computer, you've probably wondered where you could find wireless connection when you're away from your office or home. If you're a business owner like me, you may prefer free hotspots, which you can find through [AnchorFree](#). There's also [JiWire](#), which turns up both free and paid hotspots, though it missed the free hotspot that AnchorFree found in my suburb.

[Wakerupper](#) can also help road warriors. It sends free wake-up calls to your phone anywhere in the U.S. or Canada.

P.S. **Following up last month's style box article**, check out "[An Assault on Style Boxes](#)" in *Advisor Perspectives*.

P.P.S. **Thank you for making my BSAS program a sell-out!** In 2008 I'll deliver the program in Naples, Fla. and Edmonton, Canada.

Quick Links...

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

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