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# Susan B. Weiner Investment Writing

**July 2008**

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**SRI: A new requirement for fiduciaries?**

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Ten years from now, a fiduciary may feel bound to consider the tenets of socially responsible investing (SRI), predicted Peter Kinder, president, [KLD Research & Analytics](#).

That may sound crazy. But back in the early 1800s, it seemed crazy for prudent investors to use common stocks in pension funds, noted Kinder.

Kinder co-presented with Cheryl Smith, executive vice president of [Trillium Asset Management](#), on "The History and Future of Socially Responsible Investing" to the Boston Security Analysts Society on June 5. *Continue reading ["SRI: A new requirement for fiduciaries?"](#)*

On a related note, the CFA Institute has published [Environmental, Social, and Governance Factors at Listed Companies: a Manual for Investors](#).

" 'Once considered "fringe issues," these topics are now part and parcel of the metrics used by investment professionals to analyze and value the public companies they invest in,' noted Kurt Schacht, CFA, managing director of the CFA Institute Centre," according to a CFA Institute press release.

## Quants CAN communicate clearly

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Sometimes my eyes glaze over when I attend quantitative presentations. That was not the case with a presentation by Jeff Brown, chief investment officer of [Highstreet Asset Management](#).

When you click to see and hear Brown's "[Art vs. Science](#)," you'll be struck by how using examples from everyday life can make your investment approach come alive. *Continue reading "[Quants CAN communicate clearly](#)."*

## Investment and wealth management: Frontier markets, ethics, estates, NICSA

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"If you remember China 20 years ago, you get a sense of the potential for frontier markets today." This quote from Larry Speidell, chief investment officer of Frontier Market Asset Management, kicks off my article on "[Time to invest in frontier market stocks?](#)" in *Advisor Perspectives*.

Here are links to more of my writing about investment or wealth management topics:

- ["Investment industry in denial on ethics"](#)
- ["Taking the rancor out of divvying up an estate"](#)
- [My reports on the NICSA General Membership Meeting](#)

## How to find the typo

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Can you find the typo in the following line?

"Brokerages have been trying to capture the mass affluent client segment for years, but have been mission out on the best strategy."

Did you find the typo in the sentence above, which appeared in the June 23 issue of *wall street letter*? Your word processor's spell-check couldn't. That's because "mission" is spelled correctly. Microsoft Word's spell-check can't tell that the sentence only makes sense if you replace "mission" with "missing."

To prevent typos from creeping into your writing, try reading your article out loud. This will also help you improve the rhythm and flow of your piece.

Copywriter Robyn Bradley of [E.T. Robbins Productions](#) offers another tip for catching typos. Try a backwards attack. She explains, "Try reading your document 'backwards.' Start with the last sentence of the last paragraph and work your way up. You'll suddenly see misspellings or missing words because you're reading the sentences out of context."

**More writing and communications links: Lazy bastards, SEC plain language, five-minute website fixes, blogging for financial advisors**

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Here are links to some other writing and communications articles from my blog:

- ["Lazy Bastards: How We Read Online"](#)
- ["Advice from the SEC's expert on plain language"](#)
- ["101 Five-Minute Fixes to Incrementally Improve Your Website"](#)
- ["A great way for financial advisors to leverage existing content"](#)

**How I ghostwrite your articles**

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How's this explanation of my ghostwriting process? I'd appreciate your feedback on it.

**My ghostwriting process typically includes these steps:**

1. Topic identification
2. Interview of expert(s)
3. Outline
4. First draft
5. Revision, if necessary
6. Completion

**1. Topic identification**

You and I will discuss your topic over the phone.

It's helpful if you can answer these questions:

- Why do you want to write an article and what do you want it to accomplish?
- What is your topic?
- Who is your audience and what do you want them to do after they read your article?
- Why will your readers care about your article topic?
- What problem will your article solve for your readers?
- What are the three main points you'd like to make?
- Where will the article appear?
- What word count are you targeting? For example, a ghostwritten newspaper article often runs 600-1,000 words and a double-spaced, typed page runs about 200-250 words.
- By when do you need the article completed?
- What is your review and approval process?

Following this interview, I typically send you a letter of agreement that describes the scope of the work we will do together.

## **2. Interview of expert(s)**

Most of the articles that I ghostwrite are based on an interview with a single expert. Sometimes multiple experts and outside research are involved.

Prior to the interview, I will send you a list of questions to think about. If that makes you think of useful exhibits or other data, it's helpful for you to send them to me prior to our interview.

The interview will be conducted by phone and tape recorded, so I can refer back to it.

## **3. Outline**

Following our interview, I will typically send you a robust outline, so you can agree to the direction of the article before I send you a complete draft. The outline will incorporate my questions and requests for additional information needed to flesh out the article.

## **4. First draft**

After you respond to my questions and approve the outline, I will send you an article following the outline.

**5. Revisions**

My clients are often satisfied with my initial draft. However, sometimes changes are needed. Our letter of agreement will specify the scope of revisions included in your project fee.

**6. Completion**

When the process is complete, you've got an article you can publish under your name. It's ready to go!

**Quick Links...**

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[Our website](#)

[Our blog](#)

[Our client testimonials](#)