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**Investment Writing**

**August 2008**

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**A free way to publicize your white paper**

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You can leverage [LinkedIn](#) to publicize your white paper. It won't cost you anything more than the time it takes to write a LinkedIn Question. Read "[How to publicize your white paper using LinkedIn.](#)"

I'm thrilled that Russ Thornton of [Thornton Wealth Management](#) decided to follow my advice. Read his LinkedIn Question on "[How Do You Behave in a Scary Market?](#)" Be sure to click through to the white paper--it's nicely written.

Using LinkedIn won't turn your white paper into an overnight success. But what if it brought you one new client?

Business-to-business marketer Toby Younis, whose use of LinkedIn inspired my blog post, says "I added about 100 people to my email list as a result of the White Paper Marketing promotion. That may not sound like a lot, but I'm in B2B marketing, so my market isn't very large. It also generated two new clients, both of which are still with me."

Younis also gets extra visibility for his LinkedIn Questions by posting them more than once, as he did with [this survey helping him launch a new product](#). He says, "As of this writing, I've had 70 surveys

completed, and I plan to ask the same question tomorrow in another LinkedIn Q&A category."

Russ Thornton estimates that he got about 11 click-throughs from his LinkedIn Question in addition to 13 replies on LinkedIn. He says, "Like most things on the web, I think it's short-sighted to draw any meaningful conclusions from one attempt at something like this. I think it would take at least 3-5 more attempts at asking a question and posting a link to a blog post or white paper to see what kind of results you get. However, it's free and takes almost no time, so I've yet to see the downside in this approach to build more awareness of an advisor's brand and/or content."

If you try this technique, please let me know how it works for you!

On a related note, check out "[What should you call your white paper?](#)"

**More writing and communications links: Cannot vs. can not, confusing words, social media**

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

- [Which is right? "Cannot" or "Can not"?](#)
- [Website demystifies confusing words](#)
- ["Social Media in Plain English"](#)

**Optimism watch: Reasons to "hang in there" with stocks**

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Is the stock market getting you down? I'm starting an "Optimism watch" on my blog.

In "Optimism watch" posts, I'll highlight the case that other writers make for you and your clients to hang in there.

Here are some posts that encourage optimism.

- [The case for maximum pessimism](#)
- ["Could Bear Talk Be a Contrary Signal?"](#)
- [Cheer up your clients with views of Dallas Fed authors](#)

Can **you** suggest more reasons to feel optimistic? Or do you think these arguments for optimism are simply nuts? **Let me know via e-mail or post a comment on my blog.**

## **Investment and wealth management: Strategy blogs, buy-side analysts, your clients**

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Investment strategy blogs aren't exactly taking the wealth management world by storm, as I discovered when I researched them for an article in *Advisor Perspectives*.

Their acceptance by financial advisors has not been proportional to their growth rate. For example, when the CFA Institute tried to find sources for this story, most people told them they're not participating in the blogosphere, either as readers or contributors.

To the extent that investment strategy blogs are making inroads into the wealth management community it is in niche applications where, for example, they influence "buy" and "sell" decisions of advisors. In other cases, they're simply helping advisors refine their thinking and their client communications. [Continue reading "Investment Strategy Blogs Slow to Influence Financial Advisors."](#)

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

- [Are buy-side analysts inferior?](#)
- [How to make your ultra-affluent clients happy](#)
- [Wealth managers should specialize by affinity, not demographics](#)
- [Can you help your clients to control their fears?](#)

## **Help me to help you write better emails and letters to clients?**

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Can you help me learn what you need to write better emails and letters to clients?

There are three ways you can help.

1. [Answer a brief, anonymous survey](#) about the challenges of writing emails and letters.
2. **Email me your email or letter that needs editorial help.** If I select it for a rewrite on my blog, you'll get the benefit of my editorial advice for free. Naturally, identifying details will be removed from your email before it is posted. I will probably show before-and-after examples.
3. **Email me samples of well-written, jargon-free emails** on investment or wealth management topics. Please respect confidentiality and privacy when sending samples.

I know you're busy. Thank you for your help!

## What I'm writing about in 2008

My clients are keeping me busy writing about a diverse assortment of topics in 2008.



Topics include:

- Building teams to service high net worth clients
- Derivatives and computer systems
- Dividend-paying stocks
- Global opportunistic investing
- Hedge fund disaster recovery
- History of retirement plans
- Investing internationally in developed, emerging, and frontier markets
- Investment challenges facing financial advisors
- Investment strategy blogs
- Leaving a legacy to your grandchildren
- Outsourcing portfolio construction
- Probability distributions and investment management
- Recruiting and retaining female financial advisors
- Rules-based investing
- Subprime mortgage crisis

**Do you have a topic you'd like me to write about for you?** Call me now to schedule your project for this autumn. To learn more about how we might work together, read "[How I ghostwrite your financial article.](#)"

## Quick Links...

- [Our website](#)
- [Our blog](#)
- [Our client testimonials](#)

## Contact Information

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