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Will a coupon spur investment management referrals?
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An investment manager recently sent me an email newsletter with a 25% off coupon.

Here's what the coupon said:

# SAVE 25%

A reminder that as a thank you to our valued clients, those who refer a new managed account relationship to COMPANY NAME will qualify for a credit of one quarter's management fee. Please call us for further details about this program at 1-800-xxx-xxxx.

If you were a client, would this motivate you to make a referral? You can express your opinion in the poll on [my blog](#) (below my bio in the right-hand column).

## **Loomis Sayles' Dan Fuss on the 50-year opportunity in bonds**

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Opportunities in the bond market are as attractive now as they have been in at least 50 years, according to Dan Fuss, vice chairman of Loomis, Sayles & Company. He spoke on "The Bond Market Outlook" to the Boston Security Analysts Society on November 24. Fuss co-manages numerous institutional accounts, the Loomis Sayles Bond Fund, and the Loomis Sayles Strategic Income Fund.

Investors around the world are still rushing into U.S. Treasuries, but Fuss has already hit the exit. Continue reading to [learn where Fuss sees opportunities](#), according to "Dan Fuss: The 50-Year Opportunity in Bonds," my article in *Advisor Perspectives*.

On a related note, PIMCO's Mark Kiesel is urging investors to put their money in "[Credit Now, Equities Later](#)."

When it's okay to break the rules

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You can break the rules of grammar and punctuation that you learned as a kid.

I know this intuitively. But I've had a hard time coming up with guidelines for when to break the rules. Until now.

I like what Susan Gunelius said in her Entrepreneur.com article, "[Copywriting Grammar Ain't Perfect](#)."

In simplest terms, you can break any grammar rule in copywriting as long as doing so makes your copy sound conversational and more appealing to your target audience without negatively affecting your business's professional image.

So, you need to know your audience before you break rules. But that's another essential element of good communication.

Do you have a rule you like to break? Send me your example and I may cover it in a future blog post or issue of this newsletter.

## **Networking and marketing links: "The Art of Networking and Referrals"**

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"The Art of Networking and Referrals" is a teleclass offered by small business coach Karyn Greenstreet. As Karyn says, "One of the most powerful ways to get your needs met and help others at the same time is through networking and word-of-mouth referrals."

You can [listen to recording of Karyn's teleclass or read the transcript](#). If you like what you hear, check out her [listing of teleclasses](#). I usually get at least one useful tip from her teleclasses.

Here are links to other networking and marketing articles from my blog:

- ["Pack a house with nervous clients?"](#)
- ["LinkedIn's Little Secret: It's a Great Lead-Gen Tool"](#)
- [Vanguard is using LinkedIn](#)
- ["100+ Smart Ways to Use LinkedIn"](#)
- ["Downsized? Fired? Here are the new rules of finding a job"](#)

Results of last month's reader poll

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Here are the results of last month's poll on my blog, which was a follow-up to "[Should you say "No" to "Please?"](#)"

The question: do you use "please" in emails?

Results:

Always, 50%

Sometimes, 30%

Never, 20%

## **Investment and wealth management links**

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Here are links to some investment and wealth management topics that caught my eye:

- [Dan Ariely on "The Financial Markets and the Neuropsychology of Trust"](#)
- ["Female Fund Managers Make Strides," according to Morningstar](#)
- [Investing in strangers' human capital](#)

- [Pick young, small hedge funds for better returns?](#)

Having trouble with this newsletter's links?

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Are you having trouble when you click on this newsletter's links? The solution might be to re-subscribe using your personal email address.

Many of the links in this newsletter go to my Investment Writing blog. Some companies block employee access to blogs, even if the content is work-related.

If you're having this problem, you can [subscribe online using your personal email](#) address or email me, so I can add your personal email address.

### **Talks and topics: What I'm up to lately**

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Last month I presented a customized half-day workshop on "How to Write Effective Business Emails and Letters" to employees of a firm managing the finances of high net worth clients. Looking forward, I'm scheduled to present to the:

- Boston Security Analysts Society (BSAS) as one of four panelists on "[Alternative Careers for CFA Charterholders](#)" on January 14
- CFA Society of Cincinnati on "[How to Write Investment Commentary that People Will Read](#)" on March 23



Since Labor Day, I've launched a couple of client e-newsletters and written on a variety of topics, including:

- Black swans
- Bond market outlook
- Election implications for investment management and tax planning
- Family foundations
- Financial planning needs of senior executives at family-owned companies

- Global infrastructure investing
- Hedge fund performance
- Investment performance
- Outsourcing portfolio construction
- Special needs trusts
- Stable risk portfolios

Do you have an interesting idea, but lack time to put it into writing persuasively? Call me at 617-969-4509 to learn how I can help. Or go to "[How do you ghostwrite my financial article?](#)" to get a better understanding of how we can work together.



If this newsletter would interest your colleague, you can forward it with a personal note. Thank you for spreading the word!

Quick Links...

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[Our website](#)

[Our blog](#)

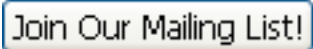
[Our client testimonials](#)

**Contact Information**

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