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How can I come up with ideas for a weekly newspaper column on personal finance?

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That's the question a newly independent advisor asked me.

Before I offer some ideas, I'm going to challenge the idea that a newspaper column must be weekly. As newspapers decline, this advisor would be lucky to get into print once a month. But let's assume the paper DOES need a weekly column. How about offering to rotate authorship with three advisors who have different niches? You'll reduce your burden and increase the range of topics covered by the column. That sounds like a win-win situation to me. If you know of anyone who's tried column-sharing, please [leave a comment on my blog post](#).

Once you've landed your column, continue reading to learn about some [sources for ideas](#).

More communications posts

- \* [If you MUST use "secular" in your investment commentary](#)
- \* ["Quantitative easing" is a weasel word](#)

- \* [What Bernanke does well as a speech writer](#)
- \* ["Quiz: Are You a Grammar Geek?"](#)
- \* ["Cut Out the Doom and Gloom Talk"](#)

**Fixed income attribution falls short**

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 Attribution analysis can help investment managers keep their clients, even in down-markets, said David Spaulding, president of The Spaulding Group, Inc. in his presentation on "Fixed Income Attribution: An Introduction" to the Boston Security Analysts Society (BSAS) on March 5. But good attribution analysis has been hard for fixed income managers to find. While equity managers have long enjoyed good models and software, the fixed income world is only catching up now, according to Spaulding. The Campisi model for fixed income attribution offers a solution.

Explanation of underperformance can save the day

Some managers underperform their benchmarks, but keep their clients because of attribution. How's that? Attribution helps them to explain what's working--and what's not. With that information, managers can reassure clients with their strategies for fixing things. This is a technique I talked about in "How can you report underperformance in your client letters?"

Equity-based models don't cut it

But many fixed income managers create their performance attribution with the equivalent of one hand tied behind their back, based on what I learned from Spaulding.

Read about the [potential solution for fixed income attribution](#).

By the way, I learned later from The Spaulding Group's 2007 Performance Measurement Attribution survey that about 41% of fixed income managers around the world--vs. 35% in the U.S.--use an equity model for fixed income attribution.

Also, if you'd like a copy of Spaulding's PowerPoint presentation, e-mail your request to [The Spaulding Group](#).

Harvard Management's Mendillo faces challenging environment

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 Even Jane Mendillo admits she had awful timing in becoming president and CEO of Harvard Management Company (HMC) on July 1, 2008, as she said in her presentation on "Endowment Management in a Changing World" to the Boston Security Analysts Society on March 25.

Continue reading to [learn where Mendillo sees opportunities](#).

**My top five tips for financial advisors dipping their toes in the Twitterverse**

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 Every day more of your clients, prospects, family, and friends get on Twitter. If you're ready to dip your toe in the Twitterverse, here are the top five tips from my personal experience.

1. Use Twitter Search to check out Twitter before you begin tweeting. Go to <http://search.twitter.com> and type in your company name or other keywords that

interest you. For example, you could [type in "Fidelity Investments."](#) Even if you don't start tweeting, you can set up ongoing Twitter searches, similar to [Google Alerts](#), and have them delivered to your RSS reader. By the way, if you need motivation to research your company on Twitter, read "[Commonwealth Bank all a-Twitter over mortgage approval tweet.](#)"

Read [four more Twitter tips](#).

More posts related to social networking

* [MFS Investment Management is using LinkedIn to circulate commentary](#)

* [A top marketing blog for financial advisors](#)

Last month's reader poll changed my emails

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Your votes surprised me. Here are the results of last month's poll on my blog, which was a follow-up to "[To 'Dear' or not to 'Dear' in your emails.](#)"

The question: **What salutation would you use in an email to me?**

Results:

31% Dear Susan--MOST POPULAR ANSWER

15% Dear Ms. Weiner

0% Hello

0% Hi

26% Hi Susan--#2 answer

23% Susan-- #3 answer

I'm stunned by "Dear Susan" winning the poll. I rarely see "Dear" in my email in-box, although it's routine in correspondence sent via U.S. mail.

I voted for "Susan," for reasons that I described in my blog post. That format dominates the emails that I receive. However, as a result of your votes I'm looking carefully at how people address me, so I can reciprocate in my emails to them.

### **Career corner: Your job interview is a sales call & other resources**

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Think of your job interview as a sales call, said recruiter [Ted Chaloner](#), president of Chaloner Associates, a Boston-based executive search firm specializing in communications, in his March 11 presentation to Boston's [Marketing Professionals Network](#).

Continue reading "[Recruiter Ted Chaloner on job interviews that get results](#)" and get a link to the firm's current openings.

By the way, I've learned of a Boston firm that's looking to hire a senior financial writer with defined benefit experience. Plus, I heard from a firm seeking a freelancer to write small cap stock articles. Email me if you'd like to learn more.

Also, I like the resume tips in "[5 Tips to Revamp Your Freelance PR/Consultant.](#)" They should work for job hunters in financial services, too.

Services for my clients on tight budgets

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We all need to get creative about helping clients with tight budgets. If your clients have family office tastes, but you're on an ETF budget, here are some ways I can help you provide great communications economically.



**1. Client letter or email consulting**

**Option A**

Make your correspondence more reader-friendly and effective. For a flat fee, you get my verbal feedback on your business correspondence of up to 250 words in length. I'll review your document with a sharp eye for improvements and then review it with you in a phone consultation.

**Option B**

In addition to the services in Option A, you'll receive an edited version in writing, completely customized with your goals in mind.

Standard turnaround for Option A and Option B is two business days. Rush pricing is also available.

**2. Newsletter critique service**

**Option A**

You spend hours researching and writing your market commentary and other newsletter content. Now let's make sure it is completely inviting, readable, and effective so that it gets read. You'll get feedback and suggestions for your newsletter's approach, organization and style based on a past quarter's newsletter.

**Option B**

In addition to the services in Option A, you'll receive a critique of your newsletter's design from a seasoned financial services designer. Is your newsletter design visually compelling? Does the overall design convey the sophisticated image you wish to convey to your audience? Should your message be supported by spot graphics?

**3. Benefit identification for your articles**

Your articles get better results when the first paragraph highlights the benefits to your readers. You'll fill out a brief questionnaire and then answer follow-up questions in a phone conversation with me. You'll receive a list of bullet points suggesting how to phrase your benefits.

**Your feedback?**

Do you think these services meet a need in the marketplace? **I'd love to hear your feedback on what investment and wealth managers are looking for.**



Please help me spread the word. Use the "Send to a Colleague" button to forward this newsletter with your personal note to your colleagues whom it would interest.

Thank you!

**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.

Quick Links...

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- [Our website](#)
- [Our blog](#)
- [Our client testimonials](#)
- ["How do you ghostwrite my financial article?"](#)

**Contact Information**

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phone: 617-969-4509

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