

2009
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**How to make your quarterly client letter fit clients at different levels of sophistication**  
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You have clients with different levels of financial sophistication. But you probably don't have the time to write separate letters tailored to each client's understanding of investment jargon. To help you manage your time--and keep your clients happy--here are my top five tips for a one-size-fits-all client letter.

Continue reading "[How to make your quarterly client letter fit clients at different levels of sophistication.](#)"

The best private equity opportunity in generations
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"Our database tells us we're in a multigenerational opportunity to be a private equity investor," said Martin Grasso, CEO of Pearl Street Capital, a private equity fund-of-funds manager. He believes that investors with longer time horizons can get above-benchmark returns without significant volatility. Grasso made his comments as a panelist on "The State of Private Equity: Opportunity Through Crisis," presented to the Boston Security Analysts Society on November 5.

Continue reading "[The best private equity opportunity in generations.](#)"

**The LinkedIn status update is your friend**  
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LinkedIn status updates are a low-key way of reminding your contacts that you exist. My status updates have directly resulted in an editor asking me to write an article and new subscribers signing up for my newsletter.

To learn how you can leverage LinkedIn status updates to meet your goals, continue reading "[The LinkedIn status update is your friend.](#)"

More posts about social networking or job hunting

- * "[Exploring the Social Media Networking and Media Landscape](#)," including slides from a presentation to the Schwab IMPACT conference by John Stone of Revenue Architects
- * "[Twitter to the rescue of my colleague with a RFP dilemma](#)," a real-life Twitter

success story

* ["Private equity job hunting tips from four professionals"](#)

May vs. might: It may matter, but it might not

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I thought I might have absorbed the difference between "may" and "might" after reading "I Wish I May, I Wish I Might" in *Grammar Girl's Quick and Dirty Tips*.

Grammar Girl, AKA Mignon Fogarty, wrote "If something is likely to happen, use may." Might is for cases when the thing is "a mighty stretch." But then I read something that challenged my assumptions.

Continue reading "[May vs. might: It may matter, but it might not.](#)"

### Last month's reader poll about abbreviating third quarter 2009

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Last month my reader poll asked "[3Q vs. Q3 09--which is better?](#)" You preferred Q3 09 to 3Q09.

Poll results

- 35% 3Q09
- 40% Q3 09
- 5% I never abbreviate
- 12% None of the above

I've come to some conclusions.

- **Write out "third quarter of 2009,"** except in exhibits or labels where space is tight. A fellow writer pointed out that *The Associated Press Stylebook* recommends avoiding alphabet soup.
- **Consider your industry's standards.** Apparently ISO standards favor 20093Q, putting the year first. In investment management, however, it's often important to compare one quarter vs. another. So it makes sense to put the quarter first. On the other hand, it seems as if stock analysts may favor Q3 09.
- **Be consistent in the way you abbreviate.** Ideally your company will pick one abbreviation as the standard and inform employees of the preferred abbreviation.

If you want to read more, check out the [discussion of this topic on LinkedIn](#).

Poll: Which brings you the most new business--email or U.S. mail marketing?

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Contact via email and U.S. mail can spur referrals and turn prospects into clients. Accordingly, this month's poll asks which brings you the most new business--email or U.S. mail marketing?

Also, if you have time, leave your comments about why you prefer one form of communication to the other. In addition, I'd enjoy hearing about what kind of communications you send. Newsletters? Sales letters? White papers? Invitations to in-person or virtual gatherings? It would be great to get a conversation going.

Continue reading "[Poll: Which brings you the most new business--email or U.S. mail marketing?](#)" Also, please answer the poll in the right-hand column of my [InvestmentWriting blog](#).

By the way, if you have ideas for future polls, please email me or leave a comment on my blog.

More marketing-related posts

\* ["Interesting example of fund company using YouTube"](#)

\* ["If you're marketing to RIAs..."](#)

## Welcome, new readers from BWF, NAPFA and beyond!

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Thank you for significantly boosting my newsletter readership in 2009! I'm delighted by ALL of my new subscribers. Some of you are finding me through Twitter, LinkedIn, and Google searches.

A special thanks to the participants who made my recent writing workshops for [Boston Women in Finance](#) and the [NAPFA MA Study Group](#) so much fun.

If you haven't seen *Investment Writing Top Tips 2009*

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You receive practical advice from me on a monthly basis. If you'd like to review some articles that are oldies but goodies, download your copy of [Investment Writing Top Tips 2009](#).



You'll find helpful tips on

- \* Client communications
- \* Grammar, punctuation, and wording
- \* Online communication and social networking
- \* Publicity
- \* Writing

I was pleased to see *Investment Writing Top Tips 2009* printed out and marked with Post-Its, when I met with a new subscriber. Thank you!

You may have seen this collection of tips before. It's automatically e-mailed to new subscribers. Plus, I offered it in a newsletter earlier this year.



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

Your colleagues' information will remain private. I have no way to learn their name or email address.

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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## Contact Information

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