

2010
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**If you--or a colleague--struggle to crank out readable blog posts...**

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...then check out "[How to Write Blog Posts People Will Read](#): A Five-Week Writing Teleclass for Financial Advisors."

Unlock your writing abilities by leveraging my experience as a seasoned financial writer and teacher. This five-week teleclass starts Feb. 25 and is available at a 50% discount. Register today, or miss your chance to reach more clients, prospects, and referral sources.

**CLICK HERE for
MORE INFO**

If you can't attend the session starting Feb. 25, email learn@investmentwriting.com to be notified about my future classes, workshops, and presentations. Or call me at 617-969-4509

Please forward this information to any colleagues who may benefit. Thank you!

Strong words from the editor of the *Financial Analysts Journal*

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"...I hereby consign the shibboleth of 'uncorrelated return' to the scrap heap of asset allocation lingo, where it shall be available only to unscrupulous sellers, credulous buyers, and unschooled investment analysts."

You can read more [strong words from Richard Ennis, executive editor of the CFA Institute's \*Financial Analysts Journal\*](#).

Other financial posts

- \* [Institutional plan sponsors make lousy decisions](#)
- \* [Tips for keeping your credit score high](#)

**"Stiglitz: U.S. Economy Will Falter without More Stimulus"**

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The U.S. government has botched its handling of the economy, according to Nobel Prize-winning economist Joseph Stiglitz. He explained how the U.S. created the global recession - and how we can get out of it - in a public presentation on his new book, *Freefall: America, Free Markets, and the Sinking of the World Economy*, at the Brattle Theatre in Cambridge, Mass., on January 25.

Continue reading [my article on Joseph Stiglitz on AdvisorPerspectives.com](#).

By the way, a reader asked, "What about the contribution to the financial crisis of the repeal of the Glass-Steagall Act and the activities of politicians who encouraged reckless lending?" Stiglitz agrees that they also contributed. In fact, as a member of the Clinton administration, he fought Glass-Steagall's repeal.

Guest post: "My Six Best Marketing Tips for Independent Advisors"

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*When Steve Lyons spoke with me about his tips for helping financial advisors market themselves, I knew that I'd like to share them with you. When I first met Steve, he was a copywriter for Fidelity Investments. Today he enjoys working with clients of all sizes, including individual advisors.*

As a professional marketer and copywriter specializing in advisor communications for print and the Web, I know firsthand the challenges independent advisors face in marketing their business to investors. Whether you're a veteran or just beginning your practice as an independent financial advisor, these marketing tips can help you stay on track to achieve your goals.

Continue reading "[My Six Best Marketing Tips for Independent Advisors](#)."

### **Poll about overweight, but not the stuff of New Year's resolutions**

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I grapple with "overweight" at the end of every year and every quarter.

It's the kind of overweight measured in percentage points, not pounds. That's because I'm writing performance reports for institutional mutual funds that may overweight or underweight sectors relative to the funds' benchmarks.

I haven't found any guidelines about how to write about these statistics, so I'd like to find out which wording you prefer for talking about a fund that has above-benchmark holdings in a sector. **If you can cite a rule in favor of one of these choices, please contact me or leave a comment on my blog.**

1. Our overweight in
2. Our overweight position in
3. Our overweight to
4. Our overweighting in
5. Our overweighting to

Please answer the poll in the right-hand column of my [InvestmentWriting blog](#). I'll report the results in next month's newsletter.

I love this fixed income presentation

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"Bonds should be boring." That's what one head of fixed income of fixed income used to tell me. But that doesn't mean that fixed income presentations should be boring.

You can read [why I liked one money manager's presentation](#) and view it on YouTube.

My enthusiasm for the presentation sparked controversy among members of the [Financial Writing/Marketing Communications group](#) on LinkedIn. Most of them

responded to it as a video that didn't work well for them. You probably need to be a member of the group to read the discussion.

## **How Putnam, Pioneer, and Mellon market to RIAs with DC assets**

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Registered investment advisors (RIAs), if you control significant defined contribution (DC) assets, then mutual fund companies are hungry for your business and will do whatever they can to accommodate you. That's the message I took away from "The 2010 Distribution Landscape," at panel at the NICSA East Coast Conference on Jan. 14. The panel, which was moderated by Matthew Bienfang of TowerGroup, included Catherine Saunders of Putnam Investments, Daniel Steele of BNY Mellon Asset Management/Dreyfus Investments, and Bill Taylor of Pioneer Investments.

Continue reading "[RIAs with DC assets are in demand by fund companies.](#)"

More marketing posts

- * [To GIPS or not to GIPS in your blog posts](#)--Insights from The Spaulding Group
- * [Moldy websites hurt your SEO, but blogging can help](#)

Last month's reader poll about your email requests to clients

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Last month my reader poll asked, "When you email a request for action to a client, what should you discuss in the first paragraph?"

1. Social niceties, such as "It was nice to see you last week..."
2. Your request, such as "Please sign and fax the attachment..."
3. Background to your request, such as "Remember we talked about adjusting your asset allocation..."

### **Poll results**

- 25% Social niceties
- 41% Your request
- 25% Background to your request
- 8% None of the above

"Your request" was the winner.

I agree that in most cases your request should go first. Think about it this way. You're being kind to your client by not making her or him search for the action you're requesting.

Social niceties have a place in your client correspondence, but when they eat up the first paragraph of your email, they slow your clients' processing of their email in-boxes. The same goes for the background to your request.

Of course, sometimes individual clients require different handling. Tailor your emails to their preferences when you can.

You can [leave a comment on my blog](#) about this topic, if you disagree or have something to say. I'd like to hear from you.

## **About writing: Blogging, spelling, mitigate**

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Here are links to some of my posts about writing and word usage:

- [Bloggers, one theme per post, please](#)
- [Do you go crazy over misspellings?](#)
- [Can you make a case for "mitigate?"](#)--A big THANK YOU to all who commented on this post
- ["You" can help your job hunting "thank you"](#)

What I've enjoyed lately

You already know that I'm excited about "How to Write Blog Posts People Will Read," so I'd like to share some of my other activities with you.

Ghost-blogging

A major mutual fund company has me blogging regularly for them. Sorry, I can't share the URL with you.

Writing workshops

Financial advisors and investment marketing professionals have given my writing workshops great reviews, as you'll see in "[Thank you, NAPFA MA Study Group for your great response to my email/letter writing workshop.](#)" My wonderful students have inspired me to make teaching a priority for 2010.

White papers and articles

Most investment and wealth management firms employ smart people who have interesting things to say. But they don't always have the time--or maybe the expertise--to write persuasively. Writing white papers on the basis of interviews with experts and reading other sources is always enjoyable for me. My experience as a reporter helps me to discover the "hook" that will intrigue readers.

Coaching

I've been coaching a financial advisor on writing blog posts. It's fun to work with someone who's so open to learning. Here's what he says about me:

Susan's coaching is a classic case of "under-promise, over-deliver." I highly recommend her as a writing coach or teacher. Her coaching has improved the quality of writing in my blog posts.

My writing skills were very rusty when we started. Susan's practical, insightful suggestions--along with her Blog Post Preparation Worksheet--have been an incredibly valuable resource. In addition to being a great communicator, she is sensitive to the fact that people's feelings may be hurt when their writing is critiqued.

Susan's knowledge about investment issues helps me to fill in the gaps when I get too technical in my writing. She prevents me from talking over people's heads. As a result, I'm reaching more people.

Writing quarterly investment performance or mutual fund annual/semiannual reports

I've written about asset allocation and international funds. This sometimes involves interviews with portfolio managers or product managers as well as digging through attribution analysis and other reports to figure out what's important.



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?

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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