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Susan B. Weiner
Investment Writing

August 2010

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In this issue

Introverts, steal this idea for your next conference

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Conferences can be shy financial advisors' worst nightmares.

You spend so much time among so many strangers. You feel especially intimidated if many attendees seem to know one another. As an introvert, I feel your pain. My shyness inspired an idea that may help outgoing as well as shy financial professionals.

"If I can't strike up conversations about my professional services, can I make people ask me about them?"

That's the question I asked myself before I attended the CFA Institute's annual conference in Boston. So I....

Continue reading "Introverts, steal this idea for your next conference."

Audiocast: "How to Guest-Blog on Personal Finance or Investments"

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If you're a current or potential blogger on investments or personal finance, this five-and-a-half minute audiocast is for you.

To listen, go to "Audiocast: How to Guest-Blog on Personal Finance or Investments."

More on blogging

- Investment manager's secret of regular blogging
- A great financial article isn't enough

- "FINRA/SEC guidance for bloggers" (see article below)
- "Guest Post: Adding Video into the Communications Mix" (see article below)
- "Financial blog post critique: 'And About That Free Financial Plan'" (see article below)
- "EARLY BIRD rate expires August 31" for Susan's blogging class (see article below)

Three writing lessons from "One Trader's Binge on Cocoa Wraps Up Chocolate Market"

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Some of us will read about hedge fund managers even if they're written about in prose as dry as the Sahara. But many people won't. This is why I'm discussing "One Trader's Binge on Cocoa Wraps Up Chocolate Market" by Julia Werdigier and Julie Creswell in the July 25 edition of *The New York Times* (free registration may be required for access to the article). As I type this blog post, this article on the front page of *The New York Times* is its "most emailed."

Continue reading "Three writing lessons from "One Trader's Binge on Cocoa Wraps Up Chocolate Market."

More on writing

- Financial ad in plain English: Another one from BNY Mellon
- RIAs, are you ready for plain language in your Form ADV "brochure"?
- Great lines from Raymond James

Guest post: "Adding Video into the Communications Mix"

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Video makes a great complement to your written financial communications. This is the message I took away from the guest video post below by Samantha Allen of Investius.

Until I watched Samantha's video, it hadn't occurred to me that short videos can attract readers, so they're willing to read publications that go into greater depth on the same topic. I'd been thinking of video as a competing format that appeals to people who prefer visual learning. Thanks, Samantha!

Adding Video into the Communications Mix
By Samantha Allen

To watch the video, go to "Adding Video into the Communications Mix."

"CFA credential implies a standard of care not always upheld," says Forbes opinion piece

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Edward Siedle questions the integrity of some CFA charterholders in "Investors Misled By Brokers Masquerading As Fiduciaries: CFA credential implies a standard of care not always upheld," an August 9 "Expert View" on Forbes.com. Siedle is a former SEC attorney and the president of Benchmark Financial Services.
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While I think Siedle overstates his case, he raises an interesting point.

Continue reading "'CFA credential implies a standard of care not always upheld,' says Forbes opinion piece."

Financial blog post critique: "And About That Free Financial Plan"
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If you've ever wondered what a professional writer would think about your blog post, now you have a chance to find out. I'm offering a gentle critique of a financial advisor's already-published post as a monthly feature in the Discussion section of my Facebook page. I**f you'd like to volunteer for a future critique, please reply to this email with your name, contact information, and a link to your blog post**.

Nathan Gehring of the Living Financially Aware blog is our first volunteer. Thanks, Nathan! I critique his blog post, "And About That Free Financial Plan," below.

CRITIQUE
Telling a story to make your point is a great idea. Especially when you use a common experience such as a doctor's visit. Overall, the blog post flows nicely.

I also liked Nathan's use of "you" throughout his blog post. It makes readers feel as if he is talking directly to them. It fits nicely with Nathan's friend, conversational tone.

This blog post might benefit from.... Continue reading "Financial blog post critique." If you have trouble with this link, you can find the critique the in the **Discussions** section of the Investment Writing Facebook page. It's the discussion started on July 13.

FINRA / SEC compliance guidance for bloggers
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Registered representatives and registered investment advisors (RIAs) fall under two different regulators when they blog. Reps must grapple with FINRA's regulations, while RIAs enjoy more freedom under the Securities and Exchange Commission (SEC).

Continue reading "FINRA/SEC compliance guidance for bloggers" for guidelines and a resource list.

Poll: Should you make investment predictions that can backfire?
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The investment strategies of Bill Gross, founder and co-chief investment officer of PIMCO, influence the asset allocations of investment professionals around the world. Should he also influence your approach to your market commentary?

"Vigilante on the move," a profile of PIMCO that appeared in The Economist, got me thinking with the following paragraph.

Continue reading "Should you make investment predictions that can backfire?" **Please respond to the poll** in the right-hand column of my blog (the fourth section down, below "Recent Posts."
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Last month's reader poll: How can Boston make itself more competitive as an investment management center?
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Last month's reader poll was my first dud. It asked, "How can Boston make itself more competitive as an investment management center?" Hardly anyone replied, which surprised the heck out of me because my blog post on "Where Are We Heading? The Future of Investment Management in Boston" was very popular.

The few respondents to this poll favored "none of the above" as the solutions to boosting Boston's competitiveness. None of them left comments.

However, I received some pointed reactions on LinkedIn.

> "Over the past 10 or 15 years Investment Management in Boston has become like a Dell assembly line, a commodity that gets stamped out with no real emphasis on the client."
>
> "I say instead of having the investment teams recycle the same tenured i-bankers and analysts responsible for underperforming their benchmarks, let's get some fresh faces and outsider voices on the teams."

Where you can find me--online and in person
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"How writers can use e-newsletters to grow their business" on August 25
Join me for a live Twitter chat on "Using an e-newsletter to promote your business" on Wed., August 25 from 11:30 a.m.-12:30 p.m. Eastern.

I will be a guest on writer-blogger Michelle Rafter's WordCount Last Wednesday. Michelle will host the chat. To follow along, use the hashtag #wclw.

Financial advisors are welcome to participate, although the chat is aimed at writers. The basics of e-newsletters are similar across professions.

Have questions you'd like me to address on the chat? Email me or send me a tweet at @susanweiner. You can learn more about WordCount Last Wednesday on Michelle's blog post about the July chat.

"How to Write Blog Posts People Will Read: A 5-Week Teleclass for Financial Advisors," Sept 23-Oct. 21, 2010

- How to Write Blog Posts People Will Read: A 5-Week Teleclass for Financial Advisors starts Sept. 23 at 1:00 Eastern and meets for one-hour on a total of five consecutive Thursdays. Click on the link above for more details.
- EARLY BIRD rate expires AUGUST 31.

April 29 - May 1, 2011

- [40th Annual ASJA Writers Conference]
- I will moderate two panels on corporate writing

Quoted, linked or mentioned online

My name or blog pops up in

- "Meet 3 Wired Advisors Who Are Mastering Social Media" and in the replay of the webinar, "Strategic Blogging for Financial Advisors" --Thank you, Cathy, Pat, and Stephanie!
- "Social for RIAs"--Thanks, Joe!

I also enjoyed "My 20 seconds of fame on the ASJA home page."

Find us on Facebook

I've started developing a Facebook business page for the convenience of my readers who prefer to read my content in their Facebook news feeds. I'd be delighted if you would "like" my page.

EARLY BIRD rate expires AUGUST 31

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CLICK HERE for MORE INFO

August 31 is your last chance to register for How to Write Blog Posts People Will Read: A 5-Week Teleclass for Financial Advisors **at the Early Bird rate of only $300** for my e-newsletter subscribers and clients.

The next session of "How to Write Blog Posts People Will Read" starts on Thursday, Sept 23, 1:00-2:00 p.m. Eastern Time and runs for five consecutive weeks through Thursday, October 21. You'll find all of the details on the registration site.

CLICK AND REGISTER

The teleclass price rises to $450 for subscribers ($600 for non-subscribers) at 12 midnight (Eastern) on Tues., August 31. Of course, $450 is still a significant discount from the full price of $600 for non-subscribers.

CLICK AND REGISTER

You will learn how to

1. **Generate and refine ideas** for blog posts that will engage your readers
2. **Organize your thoughts** before you write, so you can write more quickly and effectively
3. **Edit your writing**, so it's reader-friendly and appealing

CLICK AND REGISTER
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Here's what advisors say about Susan as a teacher of blog post writing:

- "**The class is great! I'm really getting a huge amount of value** -- there really is a process to writing."
- "**Loving the blog writing class** I am taking with @susanweiner #FF"
- "**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."

Send to a Colleague

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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Our website
Our blog
Our client testimonials
"How do you ghostwrite my financial article?"

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