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# Susan B. Weiner Investment Writing

**October 2010**

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Four lessons from Wasatch Funds on reporting underperformance

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Have you ever struggled to report your investment strategy's underperformance to your clients or customers? Let's look at what you can learn from how one firm tackled this challenge.

Wasatch Funds' President Jeff Cardon did such a great job in "Perspective on Performance: Energy Trends and Their Impact on Wasatch Returns" in summer 2008 that I've held onto his article, waiting for an opportunity to share with you.

Continue reading "[Four lessons from Wasatch Funds on reporting underperformance](#)"

## **Investment Writing Spotlight:**

### **"What handing out underwear taught me about financial planning"**

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"[What handing out underwear taught me about financial planning](#)" by Eric J. McClain of Wesban Financial Planning is the focus of this month's Spotlight. Thank you, Eric, for volunteering! Instructions for volunteers are at "[Are YOU the one?](#)" on my blog.

CRITIQUE

What a great title! It gave me the sense that Eric is not a stuffy guy. I wanted to discover what the heck he could learn from underwear. I also like that Eric draws on his Navy experience. For one thing, it gives me a better sense of who Eric is as a person. Also, it will help him appeal to prospects from the Navy. I'm a big fan of this kind of target marketing.

Continue reading "[Investment Writing Spotlight: "What handing out underwear taught me about financial planning"](#)"

no, No, NO: My business card shouldn't add me to your e-newsletter

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***"When people give you their business cards, you're in a relationship, so you can add them to your e-newsletter list."***

I disagree with the statement above. But I've heard it from many people. Technically speaking, you may not violate the CAN-SPAM Act if you email everyone who gives you their card. But, in my opinion, you're violating the spirit of the law. You're also making me unhappy.

I use two techniques to keep my conscience clean.

Continue reading "[no, No, NO: My business card shouldn't add me to your e-newsletter list](#)"

**Guest post: "Would you like to know how financial advisors are choosing products?"**

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Investment marketers want to know what's driving financial advisor behavior, so I asked Lisa Cohen, CEO of Momentum Partners, for a guest post.

Financial advisors, what do you think of the RepThinkTank findings that Lisa discusses? Are you-like the advisors whom she mentions-planning to increase allocations to emerging markets and international stocks?

Would you like to know how financial advisors are choosing products and making investment decisions in this market?

by Lisa Cohen

We thought you might. We did too. The recently-released first report in the RepThinkTank *Distribution Dynamics* series provides comprehensive information on investment selection and asset allocation trends. The study includes data from more than 1,000 financial advisors across all channels.

Continue reading "[Guest post: "Would you like to know how financial advisors are choosing products?"](#)"

Guest post: "How Seeking Alpha Can Build Your Professional Reputation"

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*SeekingAlpha.com looks like a great way for investment professionals to share their opinions and market themselves. So when I met Geoff Considine and learned he'd done exactly that, I asked him to guest-blog about his experience.*

**How Seeking Alpha Can Build Your Professional Reputation**

by Geoff Considine

Writing for SeekingAlpha.com has helped me develop my professional reputation and gain attention for my quantitative modeling software and consulting services. Financial professionals can build a substantial brand from SeekingAlpha. Quite a few writers, advisors, consultants, and others have developed enormous reach on the basis of

SeekingAlpha. I am certainly not even among the most successful.

Continue reading "[Guest post: "How Seeking Alpha Can Build Your Professional Reputation"](#)"

### **Blogging buddies: Financial bloggers' secret weapons**

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A blogging buddy could save your blog. You probably know a financial planner, investment manager, or wealth manager whose blog started off strong, only to peter away after a few months. If you work well with a coach or other outsiders holding you accountable, a blogging buddy can keep you on track.

How it works: Buddies 101

You and your blogging buddy set goals. For example, your goal could be to post weekly to your blog or to draft at least five posts per month.

Continue reading "[Blogging buddies: Financial bloggers' secret weapons](#)"

More on writing and marketing:

- [Lessons from "Presentation Skills for Investment Professionals"](#)
- [Effective writing and blogging is easier with a plan](#)
- [Your spell checker doesn't work](#)

Last month's reader poll:

"Investable" or "investible" - which spelling is correct?

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You agreed with me that "investable" is preferable to "investible," but a significant minority liked my idea of completely avoiding the term.

Here are the results:

- 58% Investable
- 26% Investible
- 16% It's better to avoid using the term

Here's one LinkedIn reader's comment:

I'd use the dictionary as a reliable guide to spelling. Merriam-Webster's Collegiate Dictionary, 11th edition, spells it "investable." So does American Heritage. Webster's Third International Dictionary lists "investible" as a variant spelling, but uses "investable" as its main entry. Using a variant rather than the main entry is not generally recommended, unless you have a "house rule" that requires that the variant be used.

What Google turns up may indicate a trend among ordinary speakers. The Gregg Reference Manual recommends going to [news.google.com](http://news.google.com) to see how the word is treated in edited prose. While "investible" does appear, it appears one time for almost five uses of "investable."

Let's stick with "investable."

## **Poll: Would you like to change my e-newsletter?**

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As a reader of my e-newsletters, you've probably got an opinion about what you like and where I could improve. One reader said, "I'm frustrated because I can't read all of your articles in one sitting. Could you re-send your newsletter later in the month, so I get a second chance?" She made me wonder if I should shorten or change my newsletter.

Please answer the poll in the right-hand column of my blog, asking what I should do with my newsletter. Your choices include the following:

- Don't change it
- Offer a monthly reminder with link to complete newsletter
- Offer a monthly subscription to top 3 articles
- Shorten it
- None of the above

Please [answer the poll in the right-hand column of my blog](#). I'll report on the results in the November issue of my e-newsletter.

Where you can find me--online and in person

Testimonial

"Susan has an exceptional ability to tailor investment communications to the sophistication level of any audience. She has an uncanny ability to make very complex investment and/or economics topics accessible and understandable to anyone."

--Galan Daukas, EVP, Washington Trust Bancorp



Quoted, linked or mentioned online

- Investment Writing's blog is now included among SunStar Strategic's "[Best blogs for financial marketers](#)." You'll need to scroll down to the bottom to find SunStar's blog roll. While you're there, check out the other featured bloggers, plus posts by SunStar.
- "[LinkedIn Groups Help Blog Posts Soar](#)" is my guest post on the American Society of Business Publication Editors blog. This post on the power of LinkedIn Groups appeared on the ASPBE blog because an editor found me in their LinkedIn Group.



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?"](#)



Contact Information

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