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Susan B. Weiner Investment Writing

December 2010

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In this issue

Guest post: "Client fears and financial advisor services"

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Fear prompts financial advisors' clients to make bad decisions, as Meir Statman explains in his guest post below. He's a renowned scholar in the area of behavioral finance, so I'm delighted to receive his guest contribution and a free copy of his new book, What Investors Really Want, thanks to my friends at McGraw-Hill.

Client fears and financial advisor services
By Meir Statman

Many financial advisors encountered clients who were urged by fear to cash all their stocks in late 2008 and early 2009. Today, some advisors encounter clients who are urged by fear to replace stocks and bonds with gold.

Continue reading "Client fears and financial advisor services." While you're on my blog post, please join the discussion in "Comments" about whether Statman's recommendation works.

"Has housing bottomed out?"-Karl Case and others on the U.S. housing market

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The U.S. housing market was the focus of a December 2 presentation to the Boston Security Analysts Society on "The U.S. Residential Housing Sector: Are We Near the Trough?" Scott B. Van Voorhis, lead real estate blogger for Boston.com, moderated a panel including Karl E. Case, founding partner, Fiserv Case Shiller Weiss, Inc.; Laurie Goodman, senior managing director, Amherst Securities Group, L.P.; and Brian Kinney, managing director, State Street Global Advisors.

Case disagreed with the other two panelists.

Continue reading "Has housing bottomed out?-Karl Case and others on the U.S. housing market."

Business lesson from my Tanzanian safari

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Sometimes it pays to hire an expert, even when you could do things more cheaply yourself. An expert can get you to your destination more quickly-and with less hassle-than if you travel by yourself.

My family could have reserved hotels and done a drive-yourself excursion on our recent safari through northern Tanzania, but I hate to think of all the yelling and screaming that would have resulted as we fought over "Which way shall we go?" and "Is that a lion over there?" Instead, we landed a great guide. He navigated unpaved roads with panache while spotting wildlife that was barely a speck on the horizon when I first looked in the direction he pointed. He also shared his in-depth knowledge about the animals. I got very lucky and spotted one leopard before the guide, but even that freak sighting wouldn't have happened without him because he knew where the leopards hung out in Ndutu.

Continue reading "Business lesson from my Tanzanian safari."

Guest post: "Be Compliant When Using LinkedIn Messages"

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Social media compliance is a big worry for financial advisors, so I was delighted when Bill Winterberg offered to write a guest post on three easy steps to be compliant using LinkedIn messages. I've quoted Bill in numerous blog posts and tweets on technology, social media, and tweets because he's a great resource.

Be Compliant When Using LinkedIn Messages

By Bill Winterberg, CFP®

An earlier post on InvestmentWriting.com highlighted a "whopping flaw" in LinkedIn's messaging system that poses compliance issues for financial advisors. The concern is that no viable solution exists to archive and retain messages using settings on LinkedIn.

Continue reading "Be Compliant When Using LinkedIn Messages."

Related post "Brokers, CFA charterholders, and fiduciary duty: Charterholders are not always fiduciaries."

Guest blogger guidelines for the Investment Writing blog

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Guest contributions are welcome, but must meet the following requirements to be considered for publication on my Investment Writing blog.

Continue reading "Guest blogger guidelines for the Investment Writing blog."

Investment Writing Spotlight:
"The Investment Management Process"
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John Feketekuty of Campion Wealth Management is the latest volunteer for Investment Writing Spotlight. Thank you, John!

CRITIQUE
John's draft blog post, which you'll find at the bottom of this blog post, is well organized and proceeds in a logical order from initial meeting to investment policy statement to meetings. This is a big plus. Many bloggers wander wildly.

Here's my big question for John: What would entice a prospective client to read this? It's important to tell the reader what they'll gain from reading your marketing materials, as I've discussed in "Focus on benefits, not features." To do this, bloggers should ask "How would a non-client benefit from reading this blog post?"

Continue reading "Investment Writing Spotlight: "The Investment Management Process."

Poll: Which high-impact prospecting technique works best for you?
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Some marketing techniques work better than others for financial advisors.

The five most effective techniques for freelancers (who share key characteristics with financial advisors) include the following, as described in *The Wealthy Freelancer:*

1. Tapping **your network**
2. Getting more out of **existing clients**
3. Investing in smart **local networking**
4. Leveraging **social media** as a networking tool
5. Employing **direct mail**

Please answer the poll in the right-hand column of my blog or leave a comment on "Which high-impact prospecting technique works best for you?"

Last month's reader poll:
Is the SEC's plain language requirement for Form ADV Part 2 a good idea?
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You like the SEC's plain language initiative for Form ADV, but you've got some concerns about implementation.

Here are the results of last month's poll asking, "Is the SEC's plain language requirement for Form ADV Part 2 a good idea?":

- 0% Bad idea
- 0% Okay, but will cost too much time and money
- **57% Good idea**, but I'm not sure if it'll be implemented effectively
- **43% Great idea**, I'm looking forward to it
- 0% None of the above

It'll be interesting to see how advisors handle this change in 2011.

Where you can find me--online and in person

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New York Society of Security Analysts

I'm tentatively scheduled to address the New York Society of Security Analysts in the spring of 2011. More details to follow.

Testimonial

"Susan's particularly good at working through highly technical material very quickly. That's very important in this business. A lot of people are good writers, but they have an extensive learning curve for something they're unfamiliar with. Susan was able to jump very quickly into technical material."

--Richard Koreto, editor

Quoted, linked or mentioned online

- "Escrow Accounts: What's the Deal?" is my article for HouseLogic.com, the website of the National Association of Realtors. Does your escrow account ever cross your mind? Probably not. But forgetting to monitor it can lead to lost money and a big headache. Having experienced escrow account problems firsthand, I enjoyed writing this article.
- My Investment Writing blog has been nominated as a "Top 10 Blog for Writers." Thank you!
- I was quoted in the IFA Supporters Herald on November 23. Twitter has made it easier for my content to "cross the pond" and appear in this U.K.-based online publication.

BEST WISHES FOR HAPPY HOLIDAYS AND A GREAT 2011!

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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!

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