



Susan B. Weiner
Investment Writing

January 2011

In this issue

[Financial advisor prescription by Statman evokes strong response](#)

[Financial advisor prospecting: Not all non-clients are the same](#)

[Social media lessons from the top nine Investment Writing posts for 2010](#)

[How to get a white paper written on a budget](#)

[Guest bloggers: 2010 in review](#)

[Should you go bold?](#)

[Investment Writing Spotlight: "Risk Management Isn't Just for Qualified Retirement Plans](#)

[Guest post: "The ABCs of Creative Capital Rights"](#)

Financial advisor prescription by Statman evokes strong response

"Teaching clients the science of human behavior" is how financial advisors can help clients to overcome the fears that prompt bad decisions, writes Meir Statman in "[Client fears and financial advisor services](#)," his guest post on my blog.

That may be easier said than done. As financial technology blogger Bill Winterberg said, "For a minority of clients, I think teaching the science of behavior may work in changing habits, but for the overwhelming majority, primitive survival instincts are seemingly impossible to counteract."

Continue reading "[Financial advisor prescription by Statman evokes strong response](#)."

Financial advisor prospecting: Not all non-clients are the same

Getting new clients for your investment or wealth management business is always on your mind. But there are so many prospects and so little time. One way to narrow your scope is to focus on a target market, as I described in "[First pick your target market and niche](#)." A next step is to distinguish between prospects, leads, and opportunities as defined in *The Wealthy Freelancer: 12 Secrets to Great Income and an Envidable Lifestyle* by Steve Slaunwhite, Pete Savage, and Ed Gandia.

Continue reading "[Financial advisor prospecting: Not all non-clients are the same](#)."

Social media lessons from the top nine Investment Writing posts

LinkedIn and Facebook are powerful. The 2010 analytics on my blog made me appreciate the power of social media more than ever.

The influence of LinkedIn revealed itself in my most popular blog posts of 2010. These posts ranked high because they attracted attention in LinkedIn groups. "[LinkedIn Groups Help Blog Posts Soar](#)," my guest post on the American Society of Business Publication Editors blog, discusses this phenomenon. I'd like to thank all of the LinkedIn members- and other visitors-who took the time to visit, forward, and comment on my blog posts.

Continue reading "[Social media lessons from the top nine Investment Writing posts for 2010](#)."

How to get a white paper written on a budget

~~~~~

White papers. They're a great marketing tool for investment and wealth managers. But what if you're too busy to write and you lack the money to hire someone to craft your white paper from start to finish?

Three strategies suggested by Steve Slaunwhite in his chapter on "Create Your Amazing Buzz Piece" in *The Wealthy Freelancer* can help.

Continue reading "[How to get a white paper written on a budget](#)."

### Guest bloggers: 2010 in review

~~~~~

I'm thankful for the knowledgeable and talented professionals who have contributed guest posts to my blog this year.

Here's a list of guest posts sorted by topic, including client communications, marketing, social media, and writing.

Continue reading "[Guest bloggers: 2010 in review](#)."

Should you go bold?

~~~~~

**Bold** type, which is thicker than regular type, can make it easier for readers to grasp your meaning. This happens only if you bold wisely. Go overboard with bold, and you may lose readers.

### When to bold

Here are three ways I'd use bold in a blog post:

Continue reading "[Should you go bold?](#)"

### Related posts:

- [The letter reader who's your biggest nightmare](#)
- [WikiLeaks writing tip](#)

- [Forget your spell checker!](#)

**Investment Writing Spotlight:  
"Risk Management Isn't Just for Qualified Retirement Plans"**

-----

This *Investment Writing Spotlight* looks at benefits consultant John Lowell's "Risk Management Isn't Just for Qualified Retirement Plans." Thank you for putting your post in the Spotlight, John!

Continue reading for [my critique](#).

**Guest post: "The ABCs of Creative Capital Rights"**

-----

*Creative rights are complicated, but every writer and marketer needs to understand them. I'm happy that my friend, writer Wendy Cook, is letting me share her blog post on this topic.*

**The ABCs of Creative Capital Rights**

By Wendy J. Cook

As a creator of creative capital, I think I can offer some good ideas from the front lines on frequently asked questions about its ownership, such as:

- (1) How can I safely "borrow" from other people's work?
- (2) Should I protect my own work?
- (3) What if I've hired a freelance writer?

**Learning the Alphabet**

Let's begin with [a brief tour of the creative lingo](#).

**How do you define outperformance by stock funds?**

-----

Portfolio managers want to outperform their benchmarks. There's no question in my mind about this. But how much of an advantage do you need before you can claim outperformance?

Please answer the poll in the right-hand column of my blog or leave a comment on "[How do you define outperformance by stock funds?](#)"

This topic is stirring up controversy on my blog and in some of my LinkedIn Groups. Join the conversation!

**Last month's reader poll:  
Which high-impact prospecting technique works best for you?**

In last month's poll I asked, "[Which high-impact prospecting technique works best for you?](#)"

"Tapping your network" came in first place, followed by direct mail and "getting more out of existing clients."

I was surprised that smart local networking garnered no votes. The 100 or so face-to-face informational interviews that I did in 2003 became a foundation of my success. Participation in the Boston Security Analysts Society, the local chapter of the CFA Institute, has also been very valuable. However, I imagine that you value local networking, even though no one put it in the top spot.

Here are the results:

- 40% Tapping your network
- 20% Getting more out of existing clients
- 0% Investing in smart local networking
- 10% Leveraging social media as a networking tool
- 30% Employing direct mail

**Where you can find me--online and in person**

**New York Society of Security Analysts on April 28**

I'm scheduled to speak about "How to Write Investment Commentary People Will Read" to the New York Society of Security Analysts on Thursday, April 28. The meeting runs from 12 noon to 1:30 p.m. I'll let you know once they announce the details.

I may speak to another professional society later that day.

**Testimonial**

"Susan makes my job easy. She is reliable and fast. She is an incredibly creative and valuable resource."

--Kitty Kennedy, when she was executive director of the Boston Security Analysts Society



**Quoted, linked or mentioned online**

The CFA Institute shared my Karl Case blog post on its Facebook page

My LinkedIn photo showed up in Stephanie Sammons' [Social Media Examiner article with great tips](#) [LinkedIn Group tips](#). By the way, I've also written about the power of LinkedIn Groups in "[LinkedIn Groups Help Blog Posts Soar](#)" on the American Society of Business Publication Editors blog.

**Where you can find me--online and in person**

**New York Society of Security Analysts on April 28**

I'm scheduled to speak about "How to Write Investment Commentary People Will Read" to the [New York Society of Security Analysts](#) on Thursday, April 28. The meeting runs from 12 noon to 1:30 p.m. I'll let you know once they announce the details.

I may speak to another professional society later that day.

**Testimonial**

"Susan makes my job easy. She is reliable and fast. She is an incredibly creative and valuable resource."

--Kitty Kennedy, when she was executive director of the Boston Security Analysts Society



**Quoted, linked or mentioned online**

The CFA Institute shared my Karl Case blog post on its [Facebook page](#).

My LinkedIn photo showed up in Stephanie Sammons' [Social Media Examiner article with great tips LinkedIn Group tips](#). By the way, I've also written about the power of LinkedIn Groups in "[LinkedIn Groups Help Blog Posts Soar](#)" on the American Society of Business Publication Editors blog.



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 names or email addresses.

Thank you!

**Quick Links...**

- [Our website](#)
- [Our blog](#)
- [Our client testimonials](#)
- ["How do you ghostwrite my financial article?"](#)



**Contact Information**

1/11/2011

Financial advisor prescription by Statm...

phone: 617-969-4509

-----  
[Join Our Mailing List!](#)

Copyright 2011 by Susan B. Weiner All rights reserved

[Forward email](#)



This email was sent to jlerman@coldspringdesign.com by [newsletter@investmentwriting.com](mailto:newsletter@investmentwriting.com) | [Update Profile/Email Address](#) | Instant removal with [SafeUnsubscribe™](#) | [Privacy Policy](#).

InvestmentWriting.com | 30 Jerome Avenue | West Newton | MA | 02465