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Investment Writing

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Defining investment outperformance: You've got strong opinions

You don't agree on [how to define outperformance by stock funds](#), the focus of my latest poll. You expressed your disagreement in votes as well as in your comments on my blog post, some of which I've quoted verbatim below.

Outperformance poll results

Almost 30% of you said that an advantage of even one basis point (0.01%) was enough for an investment to claim outperformance. Close to 20% put the break point at 10 basis points (bps). Overall, more than two-thirds of you said there was an absolute level at which asset managers could claim outperformance.

Thank you, everyone who answered the poll and contributed to the lively discussion!

Continue reading "[Defining investment outperformance: You've got strong opinions.](#)"

Career strategies for wealth managers without a "book of business"

"I can't get a job because I don't have a book of business."

I've heard many CFA charterholders in the field of wealth management say their career prospects are limited by their lack of clients who will follow them to a new employer. If you're in this fix, I have some suggestions for you, thanks to a lively discussion on the CFA Institute's LinkedIn Group. I've quoted only LinkedIn Group members who gave me their permission.

Continue reading "[Career strategies for wealth managers without a "book of business."](#)"

White papers: What are their essential attributes?

White papers are popular with businesses small and large. However, they don't all define "white paper" the same way.

Help me learn how YOU perceive white papers by answering the three-question survey below.

Complete my white paper survey at "[White papers: What are their essential attributes?](#)"

Best practices for institutional asset manager websites: Can you add anything?

Best practices for institutional asset manager websites don't get as much attention as retail sites in the blogosphere. So I'm asking all you seasoned institutional marketing experts to help compile a list of best practices.

In this post, designer Margaret Patterson offers tips on firm-specific information, educational content, and search optimization for institutional investment management websites. Read on for the details of Patterson's suggestions.

Continue reading "[Best practices for institutional asset manager websites-Can you add anything?](#)"

Social media: How to succeed in 30 minutes a day

LinkedIn, Facebook, and Twitter are powerful marketing tools for financial advisors. But they could easily consume you 24 hours a day. This is why I suggest you learn from [30-Minute Social Media Marketing](#) by marketer Susan Gunelius.

Cover these four areas for success

Gunelius offers sample plans for achieving social media success in just 30 minutes a day. I particularly like her idea that you divide your time among the following four areas:

- 1. Content creation
- 2. Content sharing
- 3. Connections
- 4. Community building

Continue reading "[Social media: How to succeed in 30 minutes a day.](#)"

Writing for your readers: A lesson from novelist Michael Cunningham

Who are you writing for? Answer this question correctly and you've taken a big step

toward writing a successful blog post, article or other communication.

When novelist Michael Cunningham asks this question of his students, 90% say they write for themselves. Cunningham thinks they're missing an important point.

Continue reading "[Writing for your readers: A lesson from novelist Michael Cunningham.](#)"

Financial writing tip: Don't ignore the elephant in the room

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Don't write about something controversial as if it is an accepted fact.

"Research has shown that the most active managers can beat their benchmarks handily," wrote Eleanor Laise in "The Return of The Market-Beating Fund Manager" in *The Wall Street Journal*.

Oh, really? Many financial advisors and investment professionals disagree.

Continue reading "[Financial writing tip: Don't ignore the elephant in the room.](#)"

More posts on writing and marketing:

- [Reader question: Writing resources for equity research analysts](#)
- [Business plans for financial planners: Low-cost options](#)

**Investment Writing Spotlight: "Controversy Over Disappearing CalPERS Police Officer Retirement Benefits"**

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This *Investment Writing Spotlight* looks at Chuck Rylant's "Controversy Over Disappearing CalPERS Police Officer Retirement Benefits."

Continue reading for [my critique](#).

How do you spell it? "Out-performance" vs. "outperformance"

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The Firefox browser's spellchecker keeps tagging "outperformance" as a typo. I feel very annoyed when this happens because I believe it's wrong.

Continue reading ""[How do you spell it? "Out-performance" vs. "outperformance".](#)""

**Introducing Susan to marketing managers at investment and wealth management firms**

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You're a potential client if your investment or wealth management professionals have interesting ideas that appeal to your clients, prospects, and referral sources. Your only problem: You, your staff, and the financial professionals just don't have the time-or maybe the skill-to put them into writing persuasively.

Continue reading "[Introducing Susan to marketing managers at investment and wealth management firms.](#)"

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.

American Society of Journalists and Authors 2011 Conference

I will moderate--and speak on--panels about corporate writing and white papers at "[The Write Road to Success](#)" conference which is open to the public, April 30-May 1. This is the annual conference of the American Society of Journalists and Authors.



Testimonial

"Using Susan as we have for white papers and articles has created a great deal of efficiency for us. If we were to take time away from our day to write them ourselves, it would be a real loser for us. The investment of time for us, because of her preparation work, is minimal."

--Brian Rivotto, RINET

Quoted, linked or mentioned online

My blog was mentioned in the Stone Street Advisors blog post, [1/11/11 - The Day Ahead](#), thanks to Meir Statman's recent guest post.

I continue to pop up in online news compilations by the U.K.-based [IFA Supporters Herald](#) and the [Advisor Social Media Daily](#).

I recently became a member of the East Africa Society of Investment Professionals.



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.

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