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Investment Writing

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**Advertising makes you stupid--even if you're smart or rich**

Highly educated and wealthy investors make dumb mistakes.

This is my oversimplified take on one section of "Mutual Funds: Advertising, Behavioral Models, and Investor Choice," an article by John Haslem, which appeared in the Spring 2011 issue of *The Journal of Index Investing*.

"There is a strong positive relation between advertising and investor dollar allocations," says Haslem's article, which appears to be a review of other authors' literature on his topic.

Continue reading "[Advertising makes you stupid--even if you're smart or rich.](#)"

**The Levitt test for financial risk disclosures**

Do your risk disclosures pass the Levitt test?

In "A Word to Wall street: 'Plain English,' Please," former SEC chairman Arthur Levitt sets a high standard for your communications about risk.

Levitt says, "**For the language of financial disclosure, we need to raise the standard from 'potentially understandable' to 'impossible to be misunderstood.'**" His article appeared in *The Wall Street Journal*.

Continue reading "[The Levitt test for financial risk disclosures.](#)"

**Guest post: "Personalized Risk Management Planning-A Great New Business**

**Opportunity"**

*Risk management is one of Mike Carpenter's passions, as I quickly realized when I met him. His guest post discusses how risk management planning offers opportunities for financial advisors and others who wish to grow their businesses.*

**Personalized Risk Management Planning - A Great New Business Opportunity**  
By Michael T. Carpenter

Financial advisors, wealth managers, and asset management firms can attract more assets and grow their business more easily by meeting the enormous unmet need for user-friendly, nontechnical, personal risk management planning.

Continue reading ["Guest post: "Personalized Risk Management Planning-A Great New Business Opportunity."](#)

**Woody Allen's wisdom for successful financial bloggers**

You've probably seen financial blogs that start strong, then disappear. They fail to achieve the investment or wealth management professional's goal of connecting with clients, prospects, and referral sources.

Continue reading ["Woody Allen's wisdom for successful financial bloggers."](#)

**Guest post: "Using Clause Analysis to Fix Your Complex Sentences"**

*If you can't figure out why your written sentences are too long, then you'll find a useful tool in this guest post by Joe Croscup. Joe was a wonderful assistant when I taught "How to Write Blog Posts People Will Read" last year. He is also an excellent freelance proofreader, with an eagle eye for catching inconsistencies.*

**Using Clause Analysis to Fix Your Complex Sentences**  
By Joseph Croscup

Financial markets are complicated. However, you must not allow your sophistication and knowledge to interfere with clear and concise writing. Understanding your clauses can help.

Continue reading ["Guest post: "Using Clause Analysis to Fix Your Complex Sentences."](#)

**Reader question: How can I ask clients to follow me to a new firm?**

When financial planners, wealth managers, and portfolio managers change firms, they want their clients to follow them. But clients don't fall in line as easily as ducklings following their mother. An advisor recently asked me for advice about composing a letter asking clients to switch firms.

Continue reading ["How can I ask clients to follow me to a new firm?"](#) Be sure to read the comments, too, for suggestions from Kristin Harad, Jen Baty, and more.

**Reader poll:** Which class should I offer this summer?

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If you'd like to improve your financial writing skills, would you consider taking one of my writing classes over the summer?

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

**Last month's reader poll: Would you subscribe to a weekly writing tip from InvestmentWriting.com?**

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Thank you for your encouraging response to my poll asking "Would you subscribe to a weekly writing tip from InvestmentWriting.com?"

- 82% Yes, a weekly tip would be great
- 6% I prefer a biweekly tip
- 12% I prefer a monthly tip
- 0% No, thank you

I plan to launch the weekly tip over the summer.

You can sign up for your weekly writing tip by clicking on the "Join Our Mailing List!" link near the bottom of this email. Then check "Weekly Tip." If it's too confusing, **just reply to this email and ask me to add your name to the Weekly Tip list.**

**More on writing and marketing**

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- [Projected: A word geek's nitpick](#)
- [Supercharge your message: A grasshopper story](#)
- [Reader challenge: Fix the metaphor overload](#)
- [WSJ video highlights plain English for financial advisors](#)
- [Reader question: How can I become a freelance financial writer?](#)
- [Get your copy of "Investment Writing Top Tips 2011"](#)

**Brag About Your Blog Day--Financial Advisor Edition--April 25, May 25**

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Financial advisors, investment managers, wealth managers, and the providers who serve them are bragging about their blogs on the Investment Writing Facebook page's Brag About Your Blog Day--Financial Advisor Edition.

See who took advantage of the [April 25 Brag About Your Blog Day](#).

**Mark your calendar now, so you can participate on May 25,** the next monthly Brag Day.

**Susan's update**

**Welcome, new subscribers from NYSSA and PAICR!**

The energy and enthusiasm of the New York Society of Security Analysts' (NYSSA) and Professional Association for Investment Communications Professionals' (PAICR) audiences impressed me. Our interaction inspired several ideas I've added to my "to blog" list.

I'm looking forward to continuing our dialogue through this newsletter, [my blog](#), and social media, including the [Investment Writing Facebook page](#), [LinkedIn](#), and [Twitter](#).

**New marketing ideas from ASJA**

I came home bursting with ideas from the annual conference of the American Society of Journalists and Authors. I am thinking about podcasting and other new media. I also met with an agent who said he was "intrigued" by my book idea.



**Testimonial**

"Accuracy is essential in financial writing. Susan Weiner always gets the story straight. She has interviewed my clients as a free lancer producing excellent stories for the financial advisory trades that have been absolutely on target."

--Lisbeth Wiley Chapman  
*Ink&Air*



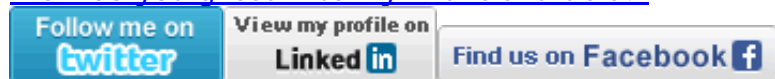
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