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# Susan B. Weiner Investment Writing

**July 2011**

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Mark Tibergien's one thing for financial advisors

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"What's the one thing that most people in this room can do to improve their business?"

This is the question I asked Mark Tibergien, CEO of Pershing Advisor Solutions, at the annual conference of the Financial Planning Association of Massachusetts on May 20.

Tibergien hit four points in his reply describing how financial planners can build a practice that differentiates them.

Continue reading ["Mark Tibergien's one thing for financial advisors' business improvement."](#)

## **Bullets can streamline your writing**

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Investment RFP writers sometimes get sloppy.

Tight deadlines allow little time for copyediting. This before-and-after example shows how adding bullet points can streamline an RFP answer. The "after" example is also easier to skim.

See the example at ["Bullets can streamline your writing."](#)

Audiocast: "How to Guest Blog on Personal Finance or Investments"

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If you're thinking about blogging—or you'd like to boost your visibility by ghost-blogging, you may enjoy this audiocast.

I've updated the list of ["Blogs that accept guest posts from financial advisors"](#) since I recorded this audiocast a year ago.

Access the audiocast at [Audiocast: "How to Guest Blog on Personal Finance or Investments."](#)

**Tweeps, share your Twitter name in your article bios**

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Twitter users, you may be missing out on valuable Twitter exposure.

The solution? Continue reading at ["Tweeps, share your Twitter name in your article bios."](#)

White paper questions and resources

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Thinking of commissioning a white paper? To ensure an effective white paper, make sure you answer the following questions:

Continue reading ["White paper questions and resources."](#)

**FPA of Mass. annual conference in tweets and posts**

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Here's some of what you missed at the annual conference of the Financial Planning Association of Massachusetts (#FPAMA), as reflected in my tweets and blog posts. I grouped my tweets by speaker. My comments on the tweets are preceded by an arrow (<-).

Bill Bachrach of Bachrach & Associates

- Advisors, do you find your clients love being videotaped by you? Bill Bachrach says they do. #FPAMA <- *Personally, this would make me feel self-conscious. However, I would like the idea that my advisor hangs on my every word.*
- "Financial planners' income need not decline with the market or the economy." - Bill Bachrach #FPAMA
- "People who are competent know the right questions and when to ask them." - Bill Bachrach, #FPAMA
- "You build trust by listening to their story, not telling yours." - Bill Bachrach #FPAMA <- *This last point is one that more financial advisors should consider when writing their websites, newsletters, and other communications.*

Read more tweets and blog posts at ["Financial Planning Association of Mass. annual conference in tweets and posts."](#)

Reader poll: Which mind mapping solution works best for you?

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Mind mapping is a powerful tool for brainstorming, analysis, and presentations. I know a handful of advisors and investment professionals who feel passionately about the value of mind mapping. I do, too.

You can create mind maps with paper and pencil or on the computer. I prefer the old-fashioned way, so I asked some of my social media friends what they use and why.

Take a moment to answer the poll in the right-hand column of the [Investment Writing blog](#).

I'll report the results in my next e-newsletter.

Not sure what mind mapping is? [Wikipedia gives a decent explanation](#). Also, I plan to blog more about it in the future.

## Last month's reader poll: What is the best thing to say when you learn a client has lost a family member?

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Last month's reader poll asked ["What is the best thing to say when you learn a client has lost a family member?"](#)

The winner was "I'm so sorry."

"I'm so sorry" is not favored by Amy Florian, the author of the article that inspired this poll (you'll find the link in [my poll post](#)). Florian says "Even when spoken sincerely and with compassion, though, it is only minimally effective."

I see Florian's point, but I'd feel rude not using a "sorry" phrase. I plan to use sorry and then add ask a question or add something. I imagine that was on the mind of the person who added the second most popular poll answer.

Here are the poll results:

- **50% I'm so sorry**
- **18% I'm so sorry. Then I add a story about the family member if I know one.** (Answer added by a poll participant.)
- 13% Is there anything I can do?
- 8% How do you hope people will remember ____?
- 5% How do you feel?
- 3% I can't imagine how you feel.
- 3% I know how you feel.
- 0% At least you still...
- 0% Call me anytime you want to talk.
- 0% Life will never be the same without...
- 0% What happened?

More on writing and marketing

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Here are links to more of my posts about writing and marketing.

- [Reader challenge: Improve this white paper introduction](#)
- [Using LinkedIn to boost your blog: "LinkedIn Groups Help Blog Posts Soar"](#)
- ["The pebble in the shoe": The power of metaphor](#)
- [Usage tips for portfolio performance commentary writers](#)

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

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"How to Write Blog Posts People Will Read: A 5-Session Class for Financial Advisors"

Class has started. I've uploaded my first audio recording and handout, which are available only to registered students. I'm looking forward to seeing my students' first homework assignments.

After previously teaching the class "live" over the phone, I've shifted to combining an audio recording along with the handouts and private website. I hope this is more convenient for the participants.



The upside of #Weinergate

If you've ever wondered how to pronounce my last name, now you know. It's pronounced like that man's. Thank you, friends, for your restraint in not teasing me about this coincidence.

Brag About Your Blog Day--Financial Advisor Edition

The next Brag Day is July 25. Please mark your calendar so you can join in.

Meanwhile, I'd like to thank all of you who have participated so far. Participants are listed in ["Participants in Brag About Your Blog Day - Financial Advisor Edition."](#)

Projects I'm working on:

- Emails for a registered investment advisor
- Ghost-blogging
- Quarterly investment performance reporting for institutional and subadvisory clients
- White papers for an investment provider, technology company, and registered investment advisor

Testimonial

"I've been bumping into your stuff all over the web and have enjoyed it. You do an excellent job of making the difficult understandable.... I'll keep my eyes open for more of your work."



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Your colleagues' information will remain private. I have no way to learn their names or email addresses.

Thank you!

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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