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# Susan B. Weiner Investment Writing

**February 2012**

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You vs. me - or we: A rant on financial marketing

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Investment and wealth management executives like to talk about themselves. Who doesn't? But this hurts their firms when it's reflected in their marketing.

I did some research on this topic with real-life financial advisors. To see what they said, continue reading "[You vs. me - or we: A rant on financial marketing.](#)"

## **Quarterly investment letters - Tell me "What makes them great?"**

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Quarterly investment letters are central to many asset managers' communications with their clients. That's why I'm asking your help in defining what makes them great.

Please [answer my six-question survey](#). I'll report on the results in a future blog post.

Continue reading "[Quarterly investment letters - Tell me 'What makes them great?'](#)"

Make your webinar a magnet for audience participation

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If you're planning your first webinar, don't forget to plan for audience participation. People who participate learn more and will give you better evaluations. I first learned this when I developed and led custom workshops on "How to Do Business with the Japanese" back in the 1980s. My financial writing workshops have only reinforced this lesson. In this post, I'll share some practical tips I learned preparing for my first webinar.

See the tips at "[Make your webinar a magnet for audience participation.](#)"

## **"Cut Adjective and Adverb Clutter," says Booher**

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 Minimize your use of adjectives and adverbs to communicate more effectively, suggests Dianna Booher in *Communicate with Confidence!* Instead, rely on nouns and verbs to convey your message.

Booher illustrates the power of her recommendation by comparing the two sentences. View the comparison in "["Cut Adjective and Adverb Clutter,' says Booher."](#)

Iowa caucuses' lessons for financial advisors

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 Advisors, which counts more for your potential clients-your personal chemistry or your process for helping them reach their financial goals?

See which mattered more to voters at "["Iowa caucuses' lessons for financial advisors."](#)

**Reader poll: How do you pluralize "index"?**

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 This month's poll asks "How do you pluralize 'index'?"

I've been surprised by how many comments this simple question has spurred in my LinkedIn Groups. I'm even more surprised by which answer is winning so far.

Please vote in the [poll that appears in the right-hand column of my blog.](#)

Last month's reader poll: How do you edit your writing for compliance?

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 Last month's reader poll asked "["How do you edit your writing for compliance?"](#)"

The most popular answer was a choice added by one of my readers: Be flexible and fight for what is important in delivering your ideas and opinions, using the techniques suggested in some of the other potential answers to this poll. I like this answer.

The second most popular answer was also added by a reader. Thank you, readers!

Here are the poll results:

- **33% Answers 1, 3, 4, 5, 6, 7. Be flexible and fight for what is important in delivering your ideas and opinions.**
- 22% Focus on truth rather than supposition or expectation. In such cases, "may" and "we believe" may be very useful. No one can say what an investment will do.
- 22% Negotiate the most important points, cave in on the rest.
- 11% Insert "may" in sentences challenged by compliance.
- 11% Insert "we believe" at the beginning of sentences challenged by compliance.
- 0% Add disclosures
- 0% Cave in to every request by compliance
- 0% Say your business is willing to accept the risks of publishing without changes.

## More on writing and marketing

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- [How I managed my presentation-writing anxiety](#)
- [Mind mapping your way to client appreciation: An FPA article](#)
- [Sales letter model: You are exceptional, but...](#)
- [Writers, organize or else! A lesson from Barry Tarshis](#)
- [Ease your struggle to find the right words](#)
- [3 tips for better advisor-client email communication](#)
- [It's not ONLY about your audience](#)
- [Get your white paper written on a budget](#)

Where you can find me--online and in person

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### Events

- "[How to Write Business Emails and Letters That People Will Read](#)" is the focus of my March 13, 2012 90-minute class in Newton, Mass. Please note: This class is not specific to financial professionals.
- "[How to Write Emails and Letters People Will Read](#)"--I'm speaking with an organization of financial advisors about presenting this as a webinar in the spring. Make sure you're signed up for my emails on "Information on upcoming classes, workshops, and other events" to receive information.
- **Blogging class**--I'm delighted that my latest blogging class has started. One of my students filed her first homework assignment within hours of my posting the first lesson.
- **Want to hire me as a speaker?** You'll find an [overview of my most popular topics](#) on my website.



### Where I'm quoted or mentioned

- My one-word poll on investment commentary was briefly the "Manager's Choice" on the CFA Institute's LinkedIn Group. That's my favorite LinkedIn Group, so I was tickled.

### Testimonial

"I like working with Susan. She's smart, she's sharp, she knows our industry very well and she writes very well. I feel I'm not very strong at writing, so it was a good combination to work with her."



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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?"](#)

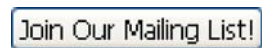


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