

April 2013

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**In this issue**

[Reader challenge: How would YOU answer this challenge to client trust?](#)

[Bust the clutter in your writing](#)

[How advisor Rick Kahler uses an editor](#)

[Guest post: Momentum tricks for bloggers](#)

[5 PR tips for financial advisors](#)

[Guest post: The Copywriter's #1 Secret...Revealed](#)

**Reader challenge: How would YOU answer this challenge to client trust?**

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Ways to grow and retain your clients' trust were the focus of Richard L. Peterson's presentation to the CFA Institute's Wealth Management conference on March 22, 2013. One of the methods he mentioned was "writing or forwarding articles for clients' benefit," which his firm's research found was also associated with higher rates of business growth. This activity is even more important when market volatility strikes.

Peterson said that you should prepare things to say or written content to forward when market gyrations rattle your clients. List three things you'd use, he suggested.

Share your tips for easing client fears about volatility at "[Reader challenge: How would YOU answer this challenge to client trust?](#)"

If you'd like to learn more about the wealth management conference, see "[CFA Institute Wealth Management Conference 2013 notes](#)" and "[Speak your client's language in reports, urges Fortigent's Welch.](#)"

Bust the clutter in your writing

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My writing is better organized than my personal possessions, so I sometimes read books about organizing. But I unexpectedly found an insight for writers in Julie Morgenstern's *SHED Your Stuff, Change Your Life*.

Continue reading at "[Bust the clutter in your writing.](#)"

### **How advisor Rick Kahler uses an editor**

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As a financial advisor or investment professional, writing is not your focus. However, you can boost the reach and effectiveness of your writing with savvy use of an editor. I'm delighted that Rick Kahler of [Kahler Financial](#) was willing to discuss with me his experience with [Kathleen Fox](#), the editor who helps with his books and columns.

By the way, unfortunately Kathleen doesn't have the capacity to take on additional clients. If you decide to look for an editor, Rick says, "It certainly makes things easier if the editor has some background in your area of expertise."

Continue reading at "[How advisor Rick Kahler uses an editor.](#)"

Guest post: Momentum tricks for bloggers

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Everyone struggles to keep up with their blogging. It's not only a problem for financial advisors, investment professionals, and the folks who support them. Writers grapple with this problem, too.

My friend Laura Laing shares some of her tricks for keeping her momentum going, including picking themes in advance, working on her blog on specific days, and having extra material so she can take breaks from generating new ideas. Laura and I welcome any suggestions you may have for managing this challenge.

See Laura's tips at "[Guest post: Momentum tricks for bloggers.](#)"

### **5 PR tips for financial advisors**

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Public relations can be a powerful tool for financial advisors. In "How to Get PR Without Hiring an Agency," [Mike Byrnes](#) shared many tips tailored to advisors in his presentation to the Financial Planning Association of Massachusetts on Feb. 27, 2013. I share some of his tips, with an emphasis on the lesser-known tips.

See if these tips will work for you at "[5 PR tips for financial advisors.](#)"

Guest post: The Copywriter's #1 Secret...Revealed

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The basic lessons of copywriting deserve repeating. Krista Magidson, whom I met

through [one of my favorite LinkedIn Groups](#), reminds us of the importance of plain English.

See Krista's take on good copywriting at "[Guest post: The Copywriter's #1 Secret...Revealed.](#)"

**Reader poll: How quickly should you respond to internal emails?**

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This month's poll asks "[How quickly should you respond to internal emails?](#)"

Email is an essential part of communications for most businesses. The speed with which you reply to emails sends a message about your company. This is true even about emails sent within your firm.

Please answer my two-question survey "[How quickly should you respond to internal emails?](#)"

Last month's reader poll: Should you go ziplining on LinkedIn?

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[Last month's reader poll](#) asked two questions: "Have you ever shared a status update about a non-business topic on LinkedIn?" and "On LinkedIn, is it a good idea to share status updates on non-business topics?"

The respondents were fairly evenly split in terms of having posted non-business status updates in the past. The majority felt that this practice is a good idea if implemented with care. I think non-business status updates may be especially useful for advisors whose compliance departments limit their freedom to post about financial topics.

Here's a comment from one naysayer: "Susan, I'm not sure how many people read their updates in an RSS feed reader. I do and non-business updates in a stream of all-business updates stick out like a sore, out-of-place thumb."

Here are the poll results:

- ***Question 1: Have you ever shared a status update about a non-business topic on LinkedIn?***
  - **52.2% No**
  - 47.7% Yes
  
- ***Question 2: On LinkedIn, is it a good idea to share status updates on non-business topics?***
  - **52.2% Yes, as long as it's done in moderation**

- **21.7% Yes, it's a great idea to show you're a human being**
- 13.0% Maybe
- 13.0% No, it detracts from one's professional image

Thank you, respondents!

**More on writing and marketing**

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- [Celebrate National Grammar Day with me](#)
- [Shortmail.com: Inspiration, but poor choice for advisors](#)
- [The two most important words are...](#)
- [Three writing lessons from "Trader's Binge Wraps Up Cocoa Market"](#)
- [Audiocast: How to guest blog on personal finance and investments](#)
- [Great lines from Raymond James](#)

Where you can find me—online and in person

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**"How to Write Investment Commentary People Will Read" in Hartford, Conn., and New York City**

- I will speak to the [CFA Society Hartford](#) on **May 2**. This is a classic presentation that I've delivered to CFA societies across the U.S. and Canada. The lunch meeting runs from 12 noon to 1:30 p.m. at the Hartford Club. Please register in advance.
- The **New York Society of Security Analysts** will host the same presentation on **May 20** at 9:00 a.m.

**"Writing Emails and Letters People Will Read"**

On May 16 I'll present "Writing Emails and Letters People Will Read" to the Financial Planning Association of Massachusetts. You can [register online for this event](#).

**"The Four Secrets of Must-Read Communications"**

I'll present "The Four Secrets of Must-Read Communications," an interactive program on investment-related communications at the [PAICR RFP Symposium in New York City](#) on May 20.

**Mistake Monday**

To improve your proofreading skills, be sure to "like" the [Investment Writing Facebook page](#) and visit on Mistake Mondays. It'll raise your awareness of common mistakes that we all make. You'll also find links focusing on blogging, writing, and marketing.



**Yes, that's really my photo on a Times Square billboard**

At 3 p.m. on March 5, I was the featured guest on ProfNet's #ConnectChat Twitter chat

moderated by Maria Perez ([@ProfNet](#)). I tweeted for journalists who'd like to shift into corporate writing. One cool thing was that my picture was posted in the Reuters billboard in Times Square as part of the chat promotion (see photo above). My recent Twitter chat for journalists trying to break into the corporate market was summarized on the [ProfNet blog](#).

**Testimonial**

"Susan Weiner's blog class is a great learning experience if you are willing to do the work each week and to learn from helpful feedback. She provides practical tools and references that I will use often as I write my blog postings."



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...**

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[Our website](#)

[Our blog](#)

[Our client testimonials](#)

["How do you ghostwrite my financial article?"](#)



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