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Susan B. Weiner  
**Investment Writing**

**June 2013**

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Hello!

It was great to meet some of you at my May presentations to the PAICR RFP Symposium, the New York Society of Security Analysts, CFA Society Hartford, and Financial Planning Association of Massachusetts!

I'm thinking about offering a free 20-minute monthly conference call to discuss writing or blogging tips. It might include 10 minutes of prepared comments and 10 minutes of discussion. Discussion was a highlight of phone calls with my blogging class students.

If that would interest you, please share any suggestions for what you'd like to discuss or [answer this survey](#). I think a monthly call might help me build awareness for my *Financial Blogging* book, which is getting closer to publication.

Speaking of blogging, check out the [blogs of my talented students!](#)

Best wishes,

Susan

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Writing: More specific is better until it's not

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Investment commentary writers often struggle to make their writing more concise. Sometimes being more precise helps.

**How to do it**

Here's a before-and-after example:

**BEFORE:** Value stocks outperformed growth stocks in the last month of the quarter.

**AFTER:** Value stocks outperformed growth stocks in June.

See the difference? I find many examples like this when I compile and edit fund performance commentary for my asset management clients.

**The flip side**

On the other hand, commentary writers sometimes go overboard with specificity...

Continue reading at "[Writing: More specific is better until it's not.](#)"

**Maintain your draft's momentum with these tips**

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If you're too busy to complete a draft in one sitting, these tips can help. When you return to a partly written draft, you may feel as if you're starting from scratch again. You have lost your momentum because you have no idea what comes next. You can beat this "blank page" feeling by leaving yourself some hints for your next words.

See my momentum techniques (and add your own) at "[Maintain your draft's momentum with these tips.](#)"

Expert sources

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In our new "Expert Sources" section, we highlight insights from other experts and industry participants. My blog post about Bob Mauterstock's presentation was included in a round-up on *The Wall Street Journal's Wealth Manager* blog on May 24.

### [How to help your clients help their aging parents](#)

Your clients' communications with their aging parents can have a big impact on their peace of mind as well as their financial plan. Bob Mauterstock of Senior Market Master knows how to improve communications. He shared his favorite technique in "Breaking Down the Barriers: Helping Your Clients Help Their Aging Parents" at the FPA of Massachusetts annual conference this year.

### [Lesson from sales training](#)

Ever wonder how to make your marketing more effective? Dave Dyer tells a story about his training as a rookie salesman that illustrates the most effective marketing method — focusing on the client, not the seller.

## More articles

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Blogging

- [Blogging buddies: Financial bloggers' secret weapon](#)
- [My blogging class students' blogs](#)
- [Simple tip for boosting your guest posts' effectiveness](#)
- [Storify as a tool for online resource lists](#)

Marketing

- [Four lessons from Wasatch Funds on reporting underperformance](#)

Writing

- [One topic per email please](#)
- [Your spell checker doesn't work, so you must proofread](#)

Testimonial

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You did a great job with the FPA annual meeting presentation on writing compelling email subject lines. I definitely took away some good ideas and have adopted them already.



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?"](#)



Contact Information

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