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# Susan B. Weiner Investment Writing

**November 2012**

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Legal danger for financial bloggers: Two misconceptions, three resources, one suggestion

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No financial blogger wants to get in trouble with the law, become liable for financial damages or tarnish his or her reputation. You've probably thought about compliance with laws governing advisors registered with the SEC, FINRA, or other regulators. But what about copyright laws?

Continue reading "[Legal danger for financial bloggers: Two misconceptions, three resources, one suggestion.](#)"

## **FAQ: "How to Write Blog Posts People Will Read: A 5-Lesson Writing Class for Financial Advisors"**

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Are you a financial professional, writer, or marketer with questions about whether my virtual class, "[How to Write Blog Posts People Will Read: A 5-Lesson Writing Class for Financial Advisors](#)," will work for you?

You'll find answers to common questions at "[FAQ: 'How to Write Blog Posts People Will Read: A 5-Lesson Class for Financial Advisors.'](#)"

The next class starts in January 2013. Sign up now for the Early Bird rate!

Marketing communication notes from #fpaexperience

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Here are some highlights from sessions I attended at FPA Experience 2012, the Financial Planning Association's annual conference, in San Antonio, Texas. You'll notice my notes focus on marketing and communication, even when that wasn't the speaker's focus.

Read the highlights in "[Marketing communication notes from #fpaexperience.](#)"

Here are more of my blog posts inspired by FPA Experience:

- [Your mother and the fiscal cliff](#)
- [Carville's advice to Romney applies to email writers, too](#)
- [If you missed my email presentation at FPA Experience...](#)

### **Guest post: "Good Writing is Good for Business"**

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Gil Weinreich and I had a great conversation about the importance to advisors of good writing when he interviewed me for an [article about email](#) that appeared on AdvisorOne. I'm delighted that I convinced him to share his thoughts in this guest post.

Read Weinreich's post at "[Guest post: 'Good Writing is Good for Business.'](#)"

Social media as practiced by Brittney Castro, Cathy Curtis, and Jeff Rose

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Financial advisors can win new clients from social media. Here are some of the highlights of what I heard from [Brittney Castro](#), [Cathy Curtis](#), and [Jeff Rose](#) in a social media panel moderated by [Michael Kitces](#) at FPA Experience in San Antonio in October 2012.

Continue reading "[Social media as practiced by Brittney Castro, Cathy Curtis, and Jeff Rose.](#)"

### **Finding easy-to-follow formulas for your blog posts**

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"Are there writing formulas I can follow?" This question from one of my blogging class students popped into my head as I read a *Wall Street Journal* article.

Continue reading "[Finding easy-to-follow formulas for your blog posts.](#)"

Reader poll: What number of examples is ideal for persuasion?

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This month's poll asks "[What number of examples is ideal?](#)"

Persuasive writing often demands examples. You can't expect your reader to take your word for everything.

The right number of examples depends on the nature and complexity of your point.

One example may be enough to prove a simple point. More examples may boost your argument's power. However, too many examples will overwhelm your readers, possibly causing them to stop reading.

**Please vote in the poll at "[What number of examples is ideal for persuasion?](#)"**

**Last month's reader poll: How do you attract readers to your financial blog?**

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Last month's reader poll asked "[What techniques help you attract readers to your blog?](#)"

There was a 5-way tie for the top spot in the poll. Commenting on other people's blogs, Facebook, SEO, Twitter, and word of mouth are the most popular techniques to attract readers.

I shared this poll on LinkedIn and received the following suggestions:

- "Content, content, content. This doesn't build an audience quickly, but rather it creates a dedicated audience that builds over time."--[Jim Blankenship](#)
- "Lots of freebies!"--[Fern Alix Larocca](#)

The top poll answers, each winning 10% of the respondents, were:

- **Commenting on other people's blogs**
- **Facebook**
- **SEO (search engine optimization)**
- **Twitter**
- **Word of mouth**

These were followed by "Offering incentives, such as free special reports" at 8% and the following at 6%"

- E-newsletters
- Guest blogging
- LinkedIn Groups
- LinkedIn Status Updates

Less popular choices include Google+ and YouTube at 4% apiece and Forums, Giveaways, Links in e-communications, Links to other blogs, and Press releases at 2%. Nobody checked off Advertising, Blog carnivals, Contests, Links in paper communications,

Participating in other people's projects, or Public speaking, workshops.

More on writing and marketing

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- [How Merrill Lynch and US Trust stay relevant to clients, according to Justine Metz](#)
- [Writing lesson from a museum exhibit](#)
- [Wise words for writers from "Alpha Better Juice"](#)
- [Email writers, think about this quote](#)
- [Please, no tiny fonts on your PowerPoint slides](#)
- [Bloggers, one theme per post, please](#)
- [Financial writers clinic: Rhythm can help you](#)
- [The power of analogy: U2 and alternative investments](#)
- [Marketing via U.S. mail still pays](#)

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

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

My next virtual class for bloggers starts on Wed., January 23. [Click to learn more!](#)

"How to Write Investment Commentary People Will Read" at the CFA Society Hartford

I'll be speaking about investment commentary at the CFA Society in Hartford, Conn. in May 2012. Stay tuned for details!

The *Investment Writing* blog was in the news!

My "Legal danger for financial bloggers" post made two suggested reading lists--one from the [CFA Institute](#) and the other from Michael Kitces of the [Nerd's Eye View](#) blog.

In the Next 10 Clients newsletter

Writing tips from my FPA Experience presentation appeared in the October 31 edition of the [Next10Clients.com](#) newsletter, written by Kristin Harad.



Testimonial

"Using Susan as we have for white papers and articles has created a great deal of efficiency for us. If we were to take time away from our day to write them ourselves, it would be a real loser for us. The investment of time for us, because of her preparation work, is minimal."



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?"](#)

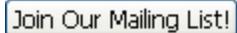


**Contact Information**

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phone: 617-969-4509

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