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# Susan B. Weiner Investment Writing

**October 2012**

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3 ways to speak plainly while giving financial advice

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I love plain English. So I was delighted to find a section called "Speaking in Plain English" in *How to Give Financial Advice to Women: Attracting & Retaining High-Net-Worth Female Clients* by Kathleen Burns Kingsbury. I've known the author since at least 2010, when she guest-blogged for me about "[Five Tips for Delivering Bad News to Clients](#)."

Burns Kingsbury suggests three ways to improve your in-person communications with clients.

Read her suggestions at "[3 ways to speak plainly while giving financial advice](#)."

## **Reader challenge: Your favorite tool for investment commentary?**

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Investment commentary is a key component of client communications for many asset managers and financial advisors. Having the right tools can make your life easier, so let's share information about them.

Share your suggestions at "[Reader challenge: Your favorite tool for investment commentary](#)."

By the way, if you're looking for inspiring sources of investment commentary, check out "[Market commentary with wit and wisdom](#)," which I compiled with help from many of this newsletter's readers.

Your mother and the "fiscal cliff"

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Talk to your mother before you use financial vocabulary in your communications.

That's one message I took away from "Guide to the Markets" presented by Andres Garcia-Amaya, a vice president with J.P. Morgan Funds, on September 29, 2012 at FPA Experience 2012 in San Antonio, Texas.

Continue reading [Your mother and the 'fiscal cliff.'](#)"

**Guest post: Why you want to announce your book with a press release**

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Writing and publishing a book takes a lot of work, so you should maximize your gains from it. This is why I invited my friend, book PR expert Sandy Beckwith, to guest-blog about press releases. By the way, I recently completed Sandy's online class about book PR, which boosted my readiness to launch my blogging book for advisors.

Read Sandy's insights at "[Guest post: Why you want to announce your book with a press release.](#)"

Monetary policy in plain English--Can you do better?

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Monetary policy. If you're a financial advisor or investment manager, you know exactly what that means. But what about your clients and other readers of your communications? Do they get it?

Continue reading at "[Monetary policy in plain English--Can you do better?](#)"

**Reader poll: How do you attract readers to your financial blog?**

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

Starting a financial blog doesn't automatically attract readers - especially not your target audience. You must work to reach your ideal readers.

Please vote in the poll. If you're a regular voter, you'll notice that I'm now placing the actual poll inside my blog posts. I'm trying to shorten my sidebar.

Last month's reader poll: Which social media tools are helping you win new business?

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Last month's reader poll asked "[Which social media tool generates the most new](#)

[business?"](#)

Most felt that Twitter brings in the most business. At FPA Experience 2012, Cathy Curtis of Curtis Financial said that she'd built a community of women on Twitter and "almost every one of them has asked me to become their advisor." Also, at FPA Experience, I heard great skepticism that social media works. Personally, LinkedIn works best for me.

Here are the poll results:

- **44% Twitter**
- **38% LinkedIn**
- 13% Facebook
- 6% None\*
- 0% GooglePlus
- 0% Pinterest

\*This answer was added by a reader. Thank you!

### **More on writing and marketing**

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- [How Merrill Lynch and US Trust stay relevant to clients, according to Justine Metz](#)
- [4 tips for reading your audience at conferences](#)
- [Market commentary with wit and wisdom](#)
- [Carville's advice to Romney applies to email writers, too](#)
- [FINRA's limits on registered rep use of ghostwriters](#)
- [Three tips for how often to publish your newsletter](#)
- [Do you go crazy over misspellings?](#)

Where you can find me--online and in person

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**FPA Experience 2012**

If you followed #fpaexperience on Twitter, you probably read writing tips from my presentation. I'd like to thank the energetic crew that tweeted me. Also, a big thanks to advisor Jeff Tomaneng for inviting me to speak. Jeff did a fabulous job organizing an entire track at the FPA Experience 2012 conference.



**Where I'm quoted**

AdvisorOne interviewed me about tips for writing effective emails. Here's the result: "[Are Clients Deleting Your Emails?](#)"

AdvisorDeck's post "[Masquerading content can get you in trouble](#)," referred to two of my blog posts. I appreciate it when sites like AdvisorDeck acknowledge my role in sparking a blog post.

**Testimonial**

"Susan, your weekly email tip received today was such a helpful reality check for me in my business writing. Thank you for prompting me about how the clock is ticking for communicating information that will actually be acted upon by readers, whether within 3 seconds, 30 seconds, or 3 minutes. You are providing valuable service to me and your many subscribers."



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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Contact Information

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