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# Investment Writing Update

*Writing that's an investment in your success*

**September 2007**

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Down with investment style boxes, and other pension consultant opinions

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Richard M. Charlton, chairman and CEO of [New England Pension Consultants \(NEPC\)](#), discussed "Consultants and Money Managers: What hath we wrought? What will the future bring?" in his Sept. 10 presentation to the Boston Security Analysts Society.

Here are his observations that most interested me:

- Investment managers have been right when they criticized investment style boxes for forcing them to choose between fitting in the box vs. adding the most value for clients. NEPC is trying to get away from that with an emphasis on total return.
- Corporate LDI (liability-driven investing) will happen.
- Global tactical asset allocation products, such as [Mellon's product](#), are becoming more important.
- "The days of 70-30 [stock vs. bond asset allocation], practically speaking, are over."

For an illustration of what's replacing the 70-30 portfolio, see page 16 of "[The Evolution of Investment Consulting: Past, Present, and Future](#)," a June 2006 presentation by Charlton.

## **Have you registered your child's domain name?**

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These days a personal website seems more and more useful. If you ever want to start your own business, reserve your domain name now. If you don't act, it may not be available when you need it.

I ended up with the domain name [InvestmentWriting.com](#) because SusanWeiner.com was taken by the time I started my website. I like my website's name and it's easy for people to spell. However, when SusanWeiner.com became available, I snapped it up and arranged for that domain name to take you to InvestmentWriting.com.

Nowadays some parents are registering their newborn children's domain names using inexpensive providers like GoDaddy.com. Perhaps you should consider it, too.

"Better Presentations with PowerPoint 2007"

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Better PowerPoint presentations begin before you turn on your computer. "Start by determining: 1) The purpose of your presentation, 2) The intended outcome of your presentation," suggests c/net's online course on "[Better Presentations with PowerPoint 2007](#)."

In fact, heed c/net's advice before you draft any written communication. It'll give your writing greater focus and help you get the results you want.

## Resource for finding quotations

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Sometimes a quote can give your communications greater oomph. You can search for quotations on the topic of your choice at [The Quotations Page](#).

I found one of my favorite quotations when I searched on "writing." for finding quotations: "I have made this [letter] longer, because I have not had the time to make it shorter." Seventeenth century mathematician Blaise Pascal's quote pinpoints the challenge of writing pithy communications. It's tough, but the results you achieve will make it worth your while.

What blogs for wealth management professionals do you recommend?

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Can you recommend blogs that target investment, financial/estate planning, or accounting professionals? I'm particularly interested in blogs that touch upon client retention and the interpersonal aspects of issues such as money, inheritance, contingency planning, and health care.

I'm looking for blogs that might be interested in having one of my author clients contribute brief items. [Online book tours of blogs are a new trend](#), as the New York Times described recently.

Please email me with your suggestions. If I get a bunch of good sites I'll report them in this newsletter or in my [SusanCFA blog](#).

## Get your free copy of Moss Adams' most recent study on advisory industry

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Read some highlights of "Uncharted Waters: Navigating the Forces Shaping the Advisory Industry" and learn how to get your free copy. Details are in [my recent SusanCFA blog post](#).

P.S. Want to see **sample sales letters?** Learn about **resources for helping your clients cope with unexpected wealth or a sudden death in the family?** Read my sales email for [Sudden Death: A Fire Drill for Building Strength and Flexibility in Families](#) or [Unexpected Wealth: A Fire Drill for Building Strength and Flexibility in Families](#).

P.P.S. There's still time to [register for "How to Write Investment Commentary that People Will Read,"](#) my Sept. 24 presentation to the Boston Security Analysts Society.

If you can't attend the September 24 program, contact Susan to present customized training at your company. You can also catch Susan at the Naples, Fla. society of the CFA Institute in April 2008.

Quick Links...

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- [Susan Weiner Investment Writing Website](#)
- [Investment blog by Susan](#)
- [Marketing and communications blog by Susan](#)

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