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## Investment Writing Update

*Writing that's an investment in your success*

**December 2007**

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### **Long road from investment article idea to publication**

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If you've ever hired a public relations consultant or tried yourself to pitch story ideas to magazines or newsletters, you've probably felt frustrated. It takes so long to get from the idea to seeing your story in print. Be patient. Even ideas that sell quickly can experience delays that are beyond the control of you or your PR professional.

During 2007 I experienced this as a writer with an emerging markets story idea. Here's the time line to give you an idea of how things work.

- April 23: Antoine van Agtmael of Emerging Markets Management spoke on "The Emerging Markets Century" to the Boston Security Analysts Society
- April 24: My brief write-up appeared in my [SusanCFA blog](#)
- May: Came up with pitch for an article for individual investors on investing in emerging market stocks
- June: Sold Bottom Line/Personal on the idea
- July: I submitted my material by my editor's deadline.
- December 15: Publication date for "Emerging-Market Stocks Are SOARING: Biggest Opportunities Now," an interview with van Agtmael, and a companion interview with Kanon Bloch Carre's Robert McCarthy on "Best Emerging-Market Funds." Luckily the market didn't change enough over five months to make the article irrelevant. The editor checked back with the sources to ensure that.

Here are my suggestions for PR-seekers based on my experience:

1. You can get your ideas picked up by a blog faster than by a print publication. Blog coverage doesn't rule out the possibility of a more detailed print article later.
2. When you're interviewed, ask when the article will appear. If you learn there's a long lead time, try to make comments that won't quickly become dated.
3. If you give an interview, then don't hear anything for months, it doesn't mean the article will never appear.
4. If it takes months longer than expected for your words to appear in print, it can't hurt to contact the writer or editor to ask if you can check your information to make sure it remains current.

### **Liberating the efficient frontier**

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"Liberating the efficient frontier" is one of four product strategies that can help investment managers to thrive. That's according to John F. Casey, chairman and David J. Bauer, partner, Casey, Quirk & Associates, who addressed the Boston Security Analysts Society on "Managing the Complete Firm in a Brave New World: Liberation and Alignment in Investment Management," on November 29, 2007.

In other words, traditional assets aren't likely to reliably produce high enough returns to meet investors' return objectives. So, investors must use non-traditional investment products such as alternative assets and "free to roam" products--such as 130-30, all-cap, or multi-cap. Demand will lead to the beta-ization of alternatives. For example, the speakers anticipate a new product that will make hedge fund returns available at significantly lower fees.

The other three product strategies include

- Packaged solutions
- Outcome oriented retirement products
- Creative funding solutions

To learn more about the views espoused by Casey and Bauer, read "[The Brave New World: Winning Product Strategies for a Changing Global Market](#)" (September 2007), a joint publication by Merrill Lynch and Casey, Quirk & Associates.

**Time-saving tips for Microsoft Outlook**

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I spend a lot of time using Microsoft Outlook. But I'm not a sophisticated user. That's why I was glad to discover Erik Sherman's "[Seven Microsoft Tips for Writers](#)," which included an easy tip on how to turn emails into contacts. Just drag the closed email into your Contacts folder. A partially filled out contact record will pop open.

Erik's "[Four More Outlook Tips for Writers](#)" taught me how to schedule emails for future delivery.

Speaking of planning ahead, I use [123 Greetings](#) to send e-cards to family and friends. You can schedule up to 60 days in advance.

**Ease your struggle to find the right word**

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Do you ever struggle to find the right word to express your meaning? Sometimes a thesaurus (there's one in Microsoft Word) can help. Or you can try [Visuword](#), a free online dictionary that graphically shows relationships between words. Roll your mouse over the proposed alternatives to view short definitions.

Alternatively, you could try the [Reverse Dictionary](#) or the [Visual Dictionary](#).

These are more resources I located through [LifeHacker](#).

**How to credit exhibits in your white papers**

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"How should I credit exhibits in a white paper?" That's a question a client asked me recently.

It's a matter of courtesy and good compliance to provide information about the sources where your exhibits originate. Indicate the sources for a graph or chart at the bottom of the chart. You can [see examples of one asset manager's sourcing style in this publication](#).

Do you need to name a source if you've generated the exhibit's information internally? You can make a case that it's not necessary. But there's no harm in crediting the internal group that's your source. It may help your white paper get through Compliance more quickly, even if Compliance doesn't require the information in your final document.

P.S. "Using Trading Costs to Identify Better Mutual Funds" Research on mutual fund trading costs can have practical implications for how you invest your clients' money. Read my recent article on "[Using Trading Costs to Identify Better Mutual Funds](#)" in *Advisor Perspectives*.

**Quick Links...**

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

**Contact Information**

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