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# Susan B. Weiner Investment Writing

**January 2009**

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"Creating Pitch Books Without Losing Your Mind... a Sequel: Your Pitch Book - a Foundation for Customizing"

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"Creating Pitch Books Without Losing Your Mind... a Sequel: Your Pitch Book - a Foundation for Customizing" is a guest post on my blog by designer Margaret Patterson. Her 2007 series about "Creating Pitch Books Without Losing Your Mind" has attracted lots of attention. Thanks for your latest contribution, Margaret!

If you have questions for Margaret, please leave them as a comment on her blog post--or you can email your questions to me. I'll make sure she gets them.

My first article about pitch books provided several "must do" tips to help your firm develop presentations that others will plagiarize, the best compliment attainable. Readers' questions have prompted additional pointers about the next phase: customizing.

When is it worthwhile for institutional and high net worth asset managers to customize?

Your first pitch book is a base. But it doesn't always address your prospective client's unique concerns. Your key contact at the prospect can tell you what points are most crucial. Add information that

addresses their concerns. But be succinct or you'll overwhelm your prospects with too much information.

Continue reading "[Creating Pitch Books Without Losing Your Mind... a Sequel.](#)"

*After you finish reading Margaret's article, **please answer the poll in my blog's right-hand column.***

"Making Sense of the Dollar"

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The U.S. economy is in better shape than you think. It may even start coming back in the second half of 2009, and the dollar will end 2009 higher versus the euro and yen.

At least, that's the optimistic outlook Marc Chandler, Brown Brothers Harriman's global head of currency, set forth in his keynote address at NISCA (National Investment Service Company Service Association) East Coast Regional Meeting on January 15, "Making Sense of the Dollar."

The U.S. will emerge from this crisis stronger than before, just as we emerged stronger from World War Two and subsequent crises, Chandler told his audience.

Continue reading my article, "[Making Sense of the Dollar](#)" in *Advisor Perspectives*.

### **Writing and marketing links: "Narrow slice" article topics are better**

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An article that covers a topic exhaustively can exhaust the reader. Writing about a narrow slice of that topic can be much more engaging.

This quote by New York Times health columnist Tara Parker-Pope, in Maura Casey's "[Tips, Tricks & Rewards of Writing Short](#)," makes a similar point:

"Kitchen sink stories do too much.... If you take on a big, unwieldy topic, you can wind up with a big, unwieldy story. Our writing improves when we try to do a little less, but do it better."

So, the next time you write about, for example, the bond market, don't try to cover everything. Pick one slice that reflects an important development in that asset class.

When I wrote about "[Dan Fuss: The 50-Year Opportunity in Bonds](#)," I didn't cover everything he discussed in his address to the Boston Security Analysts Society. Far from it. Most of his talk looked backward. I knew that you'd be more interested in looking forward, so that's where I focused.

Here are links to other writing and marketing articles from my blog:

- [Lesson from a Treasury bond headline](#)
- ["Convert Website Visitors into Leads"](#)
- ["Reasons Why Your White Papers Might Fail to Bring in New Business"](#)
- [Compliance makes social networking tougher for registered reps than RIAs](#)
- [New "Wall Street Week" seeking participants](#)

Results of last month's reader poll

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Here are the results of last month's poll on my blog, which was a follow-up to "[Will a coupon spur investment management referrals?](#)"

The question: would a coupon for a reduced management fee spur you to refer a client for investment management services?

Results:

Yes, 15%

Maybe, 0%

No, 85%

This question got me thinking about discounts. If you're going to offer a price break, do it on something that's peripheral to your business, suggests Jeff Stibel in "[In a Downturn, Discounts Can Be Dangerous.](#)" Otherwise, you risk moving your business down-market. As Stibel

says, "Just look at what happened to AOL when they discounted their services: they dropped their prices in some cases to zero, yet saw significant brand and market share erosion."

In the spirit of offering a discount on something peripheral, I am offering a free resume critique to the first newsletter subscriber who emails their resume to me. For details, see the coupon at the bottom. Also, I'm unexpectedly able to pass along a discount to an upcoming retirement income conference in Boston, as you'll read below.

### **Investing in strangers' human capital**

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Family wealth advisors say you should invest in your family's human capital. But what about investing in the human capital of strangers?

The "human capital contract" is coming to the U.S., according to "[Betting on Bob](#)" in the *Boston Globe*. How does it work? Writer Rebecca Tuhus-Dubrow explained that "...investors agree to cover the costs of college or graduate school in return for a percentage of the students' future earnings over a fixed period of time."

Continue reading "[Investing in strangers' human capital](#)."

Take advantage of a 20% discount on the Managing Retirement Income conference

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You can save 20% on your registration for the conference on "[Managing Retirement Income: Creating Solutions to Manage Downside Risk and Adapting Strategies to Preserve Retirement Income in a Shifting Economy](#)" that will be held in Boston, Feb. 9 to Feb. 12. The discount code should fill automatically when you click on the link above. If not, enter this code: **XU2358IW**

I'm just passing along this information. I don't benefit financially if you use the code. But let me know if you plan to attend. Perhaps we can meet during one of the coffee breaks.

## How am I doing with my LinkedIn Profile makeover?

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Happy New Year and thank you for your support throughout the past year! I'm grateful for your readership. I hope that the New Year brings you good health, happiness, prosperity.



One of my New Year's resolutions is to do a better job of marketing myself. Guy Kawasaki's "[LinkedIn Profile Extreme Makeover](#)" got me thinking that I should make my LinkedIn profile more appealing. His article, based on input from a corporate communications executive at LinkedIn, suggests that you should express more personality in your profile.

I've rewritten and expanded my profile following the advice in Guy's article.

Please visit [my LinkedIn profile](#) and let me know what you think. Can you suggest any improvements? Am I sharing too much? Also, tell me if you'd like to join my LinkedIn network.



Please help me spread the word. Use the "Send to a Colleague" button to forward this newsletter with your personal note to your colleagues whom it would interest.

Thank you!

Having trouble with this newsletter's links?

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Are you having trouble when you click on this newsletter's links? The solution might be to re-subscribe using your personal email address.

Many of the links in this newsletter go to my Investment Writing blog. Some companies block employee access to blogs, even if the content is work-related.

If you're having this problem, you can subscribe online using your personal email address or email me, so I can add your personal email address.

**Quick Links...**

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Contact Information

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