

In this issue

[Behavioral finance can deepen your client relationships](#)

[Financial writer's clinic: Great title, lousy intro](#)

[Fidelity expert on CMBS](#)

[Is the efficient market hypothesis dead?](#)

[Last month's reader poll about your credibility](#)

[Publishing equity research as an independent website](#)

[My trip to China](#)

[Improve your client relationships with better emails](#)

Behavioral finance can deepen your client relationships

Understanding behavioral finance can improve your client relationships. That's the lesson I took away from "Behavioral Finance: So What?", a June 15 presentation by [Gayle H. Buff, president of Buff Capital Management](#), to the Boston Security Analysts Society (BSAS). Buff has 20 years of experience working with individual investors and is a past president of the BSAS.

Like financial advisors, clients of investment and wealth managers don't act with complete rationality. They react with their emotional right brain in addition to their rational, reflective left brain.

Continue reading to [learn how you can respond to your clients' emotions](#) in a way that will benefit both of you.

Financial writer's clinic: Great title, lousy intro

"When Will Housing Recover?" This title reeled me in. I flipped directly to the article, bypassing two others. But what I found disappointed me. I'll use this article's mistakes to suggest rules you can follow in your article introductions.

Continue reading "[Financial writer's clinic](#)."

More marketing and communications posts

- * Guest post: "[Dale Carnegie and Your Clients](#)" by Lawain McNeil of AdvisorBlogger
- * "[Helping Advisors Grow](#)," a Q&A with George Tamer of TD AMERITRADE
- * [A new question you should ask reporters](#)
- * [Top three signs you should hire a freelance financial writer](#)
- * [Focus on benefits, not features, in your marketing](#)--This was the most popular article in the May issue of my newsletter

Fidelity expert on

"CMBS Challenges & Opportunity: Are CMBS Securities Mispriced?"

By some measures, commercial mortgage-backed securities (CMBS) are in good shape, according to Mark Snyderman, portfolio manager and CMBS group leader, Fidelity Investments, who presented on "CMBS Challenges & Opportunity: Are CMBS Securities

Mispriced?" to the Boston Security Analysts Society on May 5. But CMBS also face plenty of challenges.

Read more about [Snyderman's assessment of the market for CMBS](#).

Is the efficient market hypothesis dead?

The efficient market hypothesis is taking a lot of heat. It's getting slammed in opinion pieces such as George Soros' "[The three steps to financial reform](#)" and articles such as Joe Nocera's "[Poking Holes in a Theory on Markets](#)."

What do YOU think? Did the efficient market hypothesis contribute to the current financial crisis? **Please answer the poll about this** in the right-hand column of [my InvestmentWriting blog](#).

By the way, if you have ideas for future polls, please email me or leave a comment on my blog.

Last month's reader poll about your credibility

Last month I asked "[Do grammar or punctuation errors affect the writer's credibility in your eyes?](#)"

Results:

- 0% No, I don't notice errors
- 2% No, I don't care
- 22% Yes, but I forgive small errors, especially in social networking posts
- 75% Yes, it generally hurts my opinion

Only 2% of respondents answered "No." That sends a strong message about the impact that errors have on your readers.

My readers aren't the only people turned off by errors, as you'll see in "[Errors By Bloggers Kill Credibility & Traffic, Study Finds](#)."

Career corner: Publishing equity research as an independent website

Some unemployed analysts and portfolio analysts are thinking about writing and publishing their own equity research reports. If you are among them, here's an interesting LinkedIn exchange about "[What registrations are required](#) if you are looking to provide equity research reports over a website?"

My trip to China

I recently spent almost three weeks in China. It was quite an experience.

Empty your cup of yak butter tea, if you don't want a refill. Flick three drops of beer into the air before you drink--one for the Buddha, the next for the ancestors, and the third for guests. Take off your hat and sunglasses in Buddhist places of worship. These are bits of etiquette I learned in Lhasa, Tibet.

Continue reading "[My trip to China](#)."

Improve your client relationships with better emails

Client retention and acquisition are a high priority. You can't afford to alienate your readers with sloppy emails and letters. Poorly written correspondence often goes unread. A strong email commands attention.

Even the best writers benefit from a second opinion on their correspondence. Client email/letter consulting will make it easier for



your readers to understand what you want--and to follow through.



Client email or letter consulting

Option A: Verbal-only feedback

Make your correspondence more reader-friendly and effective. For a flat fee, you get practical, verbal feedback on your business correspondence of up to 250 words in length. I'll review your document with a sharp eye for improvements and then review it with you in a phone consultation.

Option B: Written revision

In addition to the services in Option A, you'll receive an edited version in writing, completely customized with your goals in mind.

Standard turnaround for Option A and Option B is within two business days of our agreement to proceed. Please provide the text of your correspondence as a Microsoft Word file.

Cost

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Option B: \$300 (Get Option B for the price of Option A **if you're the first to send in the coupon** at the end of this newsletter)

Rush pricing--and pricing for text that exceeds 250 words in length--is also available.

My usual project minimum is \$1,000. Client email/letter consulting is an exclusive service--available only to clients and newsletter subscribers.



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!

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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.

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