

2010

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Investment management job outlook for 2010

There are glimmers of hope in the investment management hiring outlook for 2010, especially for job applicants who help to generate revenues or who are in an area where cuts have been too deep. That's what I gathered from interviews or email exchanges with three observers, Michael Kulesza, managing director of Horton International's Boston office; Bob Gorog, partner in CT Partners' Boston office; and Michael Evans, president, FUSE Research Network in Boston.

Continue reading to [learn where the job opportunities lie](#).

By the way, the folks at eFinancialCareers.com liked my blog post so much they got my permission to post an edited [version on their website](#). Also, I was tickled to see that Tom Faust, CEO of Eaton Vance, made a [similar forecast about hiring](#).

Harvard's Charles Collier on "The Practices of Flourishing Families"

"The critical challenge you face is not financial," said Charles Collier, senior philanthropic adviser at Harvard University in his presentation on "The Practices of Flourishing Families" to an audience composed mostly of wealth managers at the Boston Security Analysts Society on December 15, 2009. He believes "The most critical

challenges are relationship-based and family-based."

Continue reading to learn about questions you can ask to [help your client families to flourish](#).

Guest post by Roger Wohlner, a top advisor on Twitter

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Because some of my blog and newsletter readers still wonder why an investment or wealth manager would bother with Twitter, I'm delighted to give you one advisor's perspective. "Financial Advisors and Twitter" is a guest post by financial advisor Roger Wohlner about what he has gained from Twitter.

Continue reading "[Guest post by Roger Wohlner, a top advisor on Twitter](#)."

### **Poll: Which topic should you discuss in your client email's first paragraph?**

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When you email your clients, they expect you to

- Be polite
- Be clear
- Provide any necessary background information

So when you email a request for action to a client, what should you discuss in the first paragraph?

1. Social niceties, such as "It was nice to see you last week..."
2. Your request, such as "Please sign and fax the attachment..."
3. Background to your request, such as "Remember we talked about adjusting your asset allocation..."

Please answer the poll in the right-hand column of my [InvestmentWriting blog](#). I'll report the results--and share my bias with you--in next month's newsletter. The NAPFA MA members who attended my email writing workshop know my leanings, but I wonder if I've convinced them to change their habits.

Quit being passive: A grammar tip

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If you reduce your use of the passive voice, your writing will become more powerful. That's something I often tell my writing students.

If you can't recognize the passive voice, check out the passive voice resources in "[Quit being passive: A grammar tip](#)."

### **What your kids can teach you about writing**

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"My kids learned that in school."

I've heard this comment several times after my writing workshops in which I teach a technique to help you organize your thoughts before writing.

Continue reading "[What your kids can teach you about writing.](#)"

Last month's reader poll about financial advisors' use of ghostwriters

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Last month my reader poll asked "**Should financial professionals disclose their use of ghostwriters?**" According to FINRA regulations, registered reps must disclose their use of ghostwriters, as I discussed in "[Registered reps, it's time to 'fess up.](#)"

#### **Poll results**

- 38% Yes, always
- 23% Yes, unless ghostwriter's role is very small
- 9% Sometimes, when ghostwriter's role is big
- 19% No, not if the financial professional provides the expertise
- 4% No, never
- 4% Don't know or not sure

You showed a strong preference for disclosure. However, as part of an anonymous comment on my blog, one dissenter said,

"As an investor, I couldn't care less who conducted an interview or co-wrote an article. The content is the legal responsibility of whomever's name is on it. Would a broker/dealer be able to claim in court that the opinions expressed in their literature were someone else's? (Sue the copywriter, all I did was manage the money.)"

### **My most popular blog posts of 2009**

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My most popular blog posts of 2009 fall into the following categories: social media, written communications, investment and wealth management, and careers.

Continue reading "[My most popular blog posts of 2009.](#)" By the way, I never would have guessed a spelling test would be so popular.

If you missed my last newsletter...

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...you can [read my December newsletter](#) now.

### **Thinking of starting or improving your financial blog?**

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You can get the complete scoop on "**How to Write Blog Posts People Will Read,**" my NEW five-week teleclass for financial advisors by [clicking here](#). This **discounted** class will be offered **exclusively to my newsletter subscribers and to clients.**

You'll learn--and practice--techniques that can **make ALL of your writing more powerful.**

Questions?

Please [email your questions](#) to me or call me at 617-969-4509.



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 name or email address.

Thank you!

Having trouble with this newsletter's links?

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.

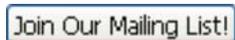
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