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Investment Writing

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### Starting **APRIL 22**: Next session of "How to Write Blog Posts People Will Read: A Five-Week Writing Teleclass for Financial Advisors"

If you struggle to crank out readable blog posts, then check out "[How to Write Blog Posts People Will Read: A Five-Week Writing Teleclass for Financial Advisors](#)." The **next session starts April 22 at 1 p.m. Eastern Time** and runs for five weeks.

My inaugural class sold out, which is why I'm offering it again.

**Unlock your writing abilities** by leveraging my experience as a seasoned financial writer and teacher. This five-week teleclass starts April 22. It is available to my newsletter subscribers and clients at a **50% discount if you register by 12 midnight Eastern time on April 7**. This discount is ONLY for newsletter subscribers and my clients. Register today, or miss your chance to reach more clients, prospects, and referral sources.

CLICK HERE for  
MORE INFO

Here's what some participants in this class said:

- "The class is great! I'm really getting a huge amount of value -- there really is a process to writing."
- "Loving the blog writing class I am taking with @susanweiner #FF"
- "Susan's coaching is a classic case of 'under-promise, over-deliver.' I highly recommend her as a writing coach or teacher. Her coaching has improved the quality of writing in my blog posts. My writing skills were very rusty when we started. Susan's practical, insightful suggestions--along with her Blog Post

Preparation Worksheet--have been an incredibly valuable resource."

If you can't attend the session starting April 22, then add ["Information on upcoming classes, workshops, and other events"](#) to your participation in Susan's email list. You can also email [learn@investmentwriting.com](mailto:learn@investmentwriting.com) or call me at 617-969-4509.

**Please forward this information** to any colleagues who may benefit.

**JPMorgan's Eigen: Put your clients in non-traditional, long-short fixed income**

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Too many of your clients are over-invested in traditional fixed income, in the opinion of William Eigen, JPMorgan Asset Management's director of absolute return strategies and portfolio manager of the JPM Strategic Income Opportunities Fund. He made a case for using fixed income funds that can go short and use synthetic financial instruments during his presentation to the Boston Security Analysts Society on March 15.

Continue reading "[JPMorgan's Eigen: Put your clients in non-traditional, long-short fixed income](#)."

**Reader question: How can I share my investment commentary on LinkedIn?**

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You can use LinkedIn, yet stay within your compliance officer's guidelines, by sharing approved materials through your LinkedIn "status line." I often suggest this to investment managers and financial advisors.

So I wasn't surprised to receive an email saying, "Help! Please remind me how to share a link to my investment commentary on LinkedIn."

[Read step-by-step instructions.](#)

**Guest post: "The Lost Art of the Thank You Card"**

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*I'm a big fan of saying "Thank you." So I'm delighted to feature this guest post by Suzanne Muusers of Prosperity Coaching. Suzanne is a consultant to financial advisors. I met her through Twitter.*

The Lost Art of the Thank You Card  
By Suzanne Muusers

What would happen to your referrals if you wrote five thank you cards per week? Would your client relationships deepen? Would you spread goodwill and kindness?

Continue reading "[The Lost Art of the Thank You Card](#)"

**Institutional equity research job hunters, check out this site!**

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If you're an analyst looking for a job in institutional equity research, you should read the ResearchWatch blog published by Integrity Research.

Continue reading "[Institutional equity research job hunters, check out this site!](#)"

**Poll: How should you thank clients for referrals?**

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Everybody knows you should thank clients when they refer business to you. But financial advisors can't agree on the right way to express their thanks.

Is a verbal thank you at your next client meeting enough? How about adding a card, gift or discount on your professional services? Often your response depends on the nature of your relationship with the client and the value of their referral.

Continue reading "[How should you thank clients for referrals?](#)"

**Please answer the poll** about thanking clients in the right-hand column of my [InvestmentWriting blog](#). I'll report the results in next month's newsletter.

**Last month's reader poll about portfolio holdings**

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Last month my reader poll asked, "Which wording do you prefer when you discuss a fund's above-benchmark holdings in a sector?"

"Our overweight position in" was the overwhelming winner. It also happens to be the preferred wording of the client for whom I write quarterly performance reports.

**Poll results \***

- 18% Our overweight in
  - 54% Our overweight position in
  - 4% Our overweighting in
  - 13% Our overweighting to
  - 9% None of the above
- \* Doesn't add up to 100% because of rounding errors

**Financial writers clinic: Lessons from Floyd Norris of *The New York Times***

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I'm a big fan of *New York Times* columnist Floyd Norris. His Feb. 27 column illustrates techniques you can use for your financial articles and blog posts.

**Lesson 1: Make your title provocative--and consider giving away your conclusion.** "Think Banks Are Out of the Woods? Maybe Not," says Norris' title.

The title achieves two positive results. Continue reading "[Financial writers clinic: Lessons from Floyd Norris of The New York Times](#)"

**About writing, blogging, and social media**

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Here are some tips about blogging and writing. I'm sharing them in honor of the twelve great students who are taking my class about writing blog posts.

- [My best posts for advisors who blog](#)
- [Tip for bloggers from novelist Will Self](#)
- [Can you over-use "you" in your marketing materials?](#)
- ["What the HELL is social media?"](#)

**Thank YOU for making me a Constant Contact All Star!**

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Thanks to **your readership**, this newsletter has been named a [Constant Contact 2009 All Star](#). Fewer than 15% of Constant Contact users make the list.

You directly contributed to my success because winners need relatively high "open" and "click through" rates. Thank you for opening this



newsletter and clicking on my links.



I will continue to aim for content that rewards your attention.

**Thank you very much!**



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?**

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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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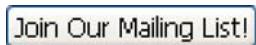
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