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**Investment Writing**

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**Technical analysis can boost the power of your  
fundamental research**

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You can use technical analysis in combination with your firm's fundamental equity analysis to help decide when to buy or sell stocks. This is the message I took away from "Applying Technical Analysis to a Fundamental Investment Strategy," a March 23 presentation to the Boston Security Analysts Society by David Keller, who oversees technical analysis as a managing director of research for Fidelity Investments.

Technical analysis is not voodoo science, throwing darts at a board, or even a prediction of the future, said Keller. Rather, it's a way to analyze supply and demand using patterns, he said.

Continue reading "[Technical analysis can boost the power of your fundamental research.](#)"

**Related post:**

[Fidelity head of technical research addresses "Where will the stock market go from here?"](#)

**The compliance-constrained financial advisor's guide to using LinkedIn, Part I**

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"I'll connect on LinkedIn if my clients ask me, but I don't see the value of LinkedIn because my compliance officer won't let me do anything."

If this is how you feel about LinkedIn, this article is for you.

Even if you can't post more than your name and company affiliation, you can benefit from LinkedIn in two big ways.

Continue reading "[The compliance-constrained financial advisor's guide to using LinkedIn, Part I.](#)"

## Harry Markopolos on the "next Ponzi scheme"

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 "Where do you think the next big Ponzi scheme will occur?" That's what I asked Harry Markopolos, author of No One Would Listen, during the Q&A following his March 30 talk to Boston Security Analysts Society (BSAS).

Markopolos isn't too worried about seeing another big Ponzi scheme soon. He gave two reasons.

Continue reading "[Harry Markopolos on 'next Ponzi scheme.'](#)"

### Related post:

\* [Tweets on talk by Harry Markopolos](#)

## Guest post: Five Tips for Delivering Bad News to Clients

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*Everyone struggles with delivering bad news to clients--and financial advisors have had to deliver plenty of bad news over the past couple years.*

*That's why I felt excited when I discovered that Kathleen Burns Kingsbury, the author of this guest post, can help advisors manage difficult communications with clients.*

### Five Tips for Delivering Bad News to Clients

By Kathleen Burns Kingsbury, LMHC, CPCC

Delivering bad news to your clients is not easy. It often stirs up uncomfortable emotions--for clients and for you. Learning how to deliver troubling news effectively in conversation and in writing newsletters sharing troublesome information is the key to maintaining good relationships with your clients in good times and bad.

Continue reading "[Five Tips for Delivering Bad News to Clients.](#)"

### Poll: Would you hire a ghost blogger for your company?

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 Investment and wealth managers have great skills. But writing isn't necessarily one of them. So what's a financial professional to do now that blogging is an important part of marketing?

Some companies hire ghostwriters to write their blog posts for them. Ghostblogging can encompass everything from coming up with the ideas, doing the research, writing, formatting posts, and even responding to comments in the voice of the company. Or it can involve a much bigger contribution from the client whose name goes on the post.

Critics say that hiring a ghostblogger is bad. "I'm a huge fan of transparency. My advice to executives is: If you don't take the time to write yourself, find another channel of communication," says communications consultant [Shel Holtz](#) as quoted in "[The Ghost Speaks](#)" by writer Michael Janofsky.

**What do YOU think? Please answer the [poll that will run in the the right-hand column of this blog](#) until I replace it with next month's poll. I'll report on the results in my May e-newsletter.**

### Last month's reader poll about thanking clients for referrals

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Last month my reader poll asked, "Which of the following are acceptable ways to thank clients for referrals?"

**Poll results\***

- 4% Discount on your professional services
- 83% Handwritten note
- 58% Meal, entertainment or gift
- 58% Phone call
- 2% SendOutCards or other automated service
- 0% Other

\*Results don't sum to 100% because respondents could check more than one answer.

The handwritten note wins by a wide margin, followed by meal/entertainment/gift and phone call. Discounts on professional services and SendOutCards weren't at all popular.

**Creative, charitable idea from Natalie Jamison**

Here's a lovely idea for thanking clients, which came to me from Natalie Jamison of Jamison Family Wealth Management in Oakville, Ontario, Canada.

Here is what I do in my business practice:  
I "pay it forward" by making a charitable donation to a charity of the client's choice. One good gesture deserves another. I am always grateful for the implied trust of a referral. The client then gets an email or a handwritten note letting them know that the donation has been made in their honor and thanking them for the introduction.

I explain this referral system on the [Tell A Friend page](#) on my website.

Thank you, Natalie!

**The power of analogy: U2 and alternative investments**

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What could the rock band U2 and hedge fund-style investing have in common?

This unlikely combination came up in a March 15 presentation to the Boston Security Analysts Society by Robert Kaimowitz, CEO and portfolio manager, Bull Path Capital Management.

Continue reading "[The power of analogy, U2 and alternative investments.](#)"

**Question re: client portals**

**Is there a way to capture your emails to clients?**

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It's tough to separate investment communications from technology, especially given the strict retention guidelines of the SEC and FINRA. That's why my ears pricked when an investment manager said that client portals can't retain emails sent through them. I took that as a challenge.

Continue reading to [learn the name of a vendor that can satisfy this manager's needs.](#)

**Early bird fee ends APRIL 7 for blogging teleclass**

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Newsletter subscribers and clients can take the next session of "How to Write Blog Posts People Will Read: A 5-Week Teleclass for Financial

CLICK HERE for MORE INFO

Advisors" at a **50% discount if you register by midnight on April 7**. Register today, or miss your chance to reach more clients, prospects, and referral sources.

*Whether you have experience writing blog posts, or are just thinking of starting a site, this is the class for you. Susan does a great job taking you through thinking of ideas, to organizing your thoughts, all the way to best practices for posts that actually work. Don't hesitate to sign up for this class!*  
--Russell Dunkin, McKinley Carter Wealth Services

Blogging has become a "must" for many independent and fee-only financial advisors. It's a great way to connect with current and potential clients. Blogging also helps drive traffic to your website and cement your reputation as a leader in your field. But many advisors struggle to crank out a steady flow of compelling blog posts. That's why you need to enroll in "How to Write Blog Posts People Will Read."



The February-March session of this class filled up. **Register soon to avoid disappointment and take advantage of the discount ending at 12 midnight (Eastern Time) on Wednesday, April 7.**

 Send to a Colleague

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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- [Our website](#)
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- ["How do you ghostwrite my financial article?"](#)

**Contact Information**

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phone: 617-969-4509  
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