

Susan B. Weiner  
**Investment Writing**

**July 2010**

**In this issue**

["Where Are We Heading? The Future of Investment Management in Boston"](#)

[BNY Mellon: I liked your "truth ad" until you used that word](#)

[Pull your white papers into the year 2010](#)

[Guest post: "Making Research Readable"](#)

[Six lessons from the CFA Institute's conference tweets](#)

[Where you can find me--online and in person](#)

**"Where Are We Heading?  
The Future of Investment Management in Boston"**

The future of investment management in Boston was the focus of a panel presentation to the Boston Security Analysts Society's annual meeting on June 24.

The view that Boston is being left behind made the greatest impact on me, but I'll report some of the opinions of the four speakers, all of whom are industry veterans.

Continue reading ["Where Are We Heading?"](#)

For more opinions from the panel, see ["Investment management career advice from industry veterans."](#)

**BNY Mellon: I liked your "truth ad" until you used that word**

BNY Mellon Wealth Management has a catchy new print ad asking "Can you handle the truth?"

I love the simplicity of "Can you handle the truth?"

You can [view one version of the ad on BNY Mellon's website](#). However, I first saw this family of ads in the print version of The Wall Street Journal.

Continue reading ["BNY Mellon: I liked your 'truth ad' until you used that word."](#)

**Pull your white papers into the year 2010**

Investment and wealth managers, you can get a lot more mileage out of your white papers today.

How's that?

Don't forget about the content once it's up on your website. Reuse it using social media.

Continue reading "[Pull your white papers into the year 2010.](#)"

**Guest post: "Making Research Readable"**

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*Investment research analysts can learn to write better. In his guest post, Joe Polidoro gives directors of research his advice on how to make this happen.*

*I'm delighted to have met another advocate of good investment writing thanks to Twitter, where Joe tweets as [@joepolidoro](#).*

**Making Research Readable**

By Joe Polidoro

Is it worthwhile, or even possible, to improve the quality of your research analysts' writing? Yes and yes, and I'll tell you how. First, the business case.

Continue reading "[Making Research Readable.](#)"

**Six lessons from the CFA Institute's conference tweets**

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You can learn some lessons for how to tweet a conference from the CFA Institute. It has done things right as it timed its Twitter debut to coincide with its annual conference. But there's still room for improvement.

Continue reading "[Six lessons from the CFA Institute's conference tweets.](#)"

**Writing, and social media links from my blog**

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**Writing**

- [Thomas Jefferson's writing wisdom](#)
- [STOP! Get a better title, or forget winning readers](#)
- [Quick email tips for financial advisors and clients in my guest post](#)

**Social media**

- [Financial blogging lessons from \*The Poetry Home Repair Manual\*: Tips for more compelling posts](#)
- [Spice up your blog with free or low-cost photos](#)

- Coming soon: **FINRA/SEC compliance guidance for bloggers**

**Poll: How can Boston make itself more competitive as an investment management center?**

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Boston's asset managers need to boost their competitiveness, according to the leaders who spoke on "[Where Are We Heading? The Future of Investment Management in Boston.](#)"

Our new poll asks "What does Boston need more of to achieve this goal?"

Please check as many answers as apply in the poll that appears in the right-hand column of this blog. You'll need to scroll down below "Recent Posts." I'll report the results in next month's newsletter.

If I missed something, please leave a comment on [my blog post about the poll.](#)

**Last month's reader poll:  
Inflation vs. deflation, spending vs. spending cuts**

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Last month my reader poll asked, "[Which should investors fear more? Which #CFA2010 speakers were right?](#)" I pitted inflation vs. deflation and fiscal stimulus vs. spending cuts.

Here are the results\*:

- 29% Inflation and fiscal stimulus
- 10% Inflation and spending cuts
- 24% Deflation and fiscal stimulus
- 38% Deflation and spending cuts
- \*Numbers don't add up to 100% because of rounding

Deflation beats out inflation more decisively than fiscal stimulus beats spending cuts. I had assumed that deflation and spending cuts would go together.

When I read Paul Krugman's "[The Myths of Austerity](#)" in *The New York Times*, I thought of this poll. Krugman argues that fiscal stimulus is compatible with tackling the deficit. He concludes, "You'll discover that what sounds like hardheaded realism actually rests on a foundation of fantasy, on the belief that invisible vigilantes will punish us if we're bad and the confidence fairy will reward us if we're good. And real-world policy - policy that will blight the lives of millions of working families - is being built on that foundation."

**Where you can find me--online and in person**

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**Events**

**Aug. 25, 2010**

- WordCount Last Wednesday



- Live Twitter chat for writers
- I'll be the featured "speaker" on "How writers can use e-newsletters to market themselves"
- Details: TBD



**Sept 23-Oct. 21, 2010**

- [How to Write Blog Posts People Will Read: A 5-Week Teleclass for Financial Advisors](#)
- I will again teach my [well-received](#) teleclass. I can't wait to meet more great students!
- Starts Sept. 23 at 1:00 Eastern and meets for one-hour on a total of five consecutive Thursdays. Click on the link above for more details.

**April 29 - May 1, 2011**

- [40th Annual ASJA Writers Conference](#)
- I will moderate two panels on corporate writing

## New online locations



I've started developing a [Facebook business page](#) for the convenience of my readers who prefer to read my content in their Facebook news feeds. I'd be delighted if you would "like" my page.

My [Investment Writing blog](#) joined my website and converted to WordPress.

I've also [guest blogged about email for Kathleen Burns Kingsbury's Wealth Connection blog](#) and [one of my blog posts was the focus of an article by eFinancial Careers](#).

I'm also cited in [@researchpuzzler](#) Tom Brakke's [Research Puzzle Pics](#) for introducing him to an interesting Mercer white paper on "[Diversification: A Look at Risk Factors](#)." You may also enjoy this white paper, which I discussed on Twitter.



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.

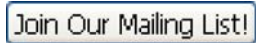
**Quick Links...**

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



**Contact Information**

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