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Susan B. Weiner
Investment Writing

November 2010

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In this issue

ISI's Straszheim: China's interest rate hike is "tapping the brakes"

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"China raised interest rates and everybody is all upset about that," said Donald Straszheim at the start of his Oct. 19 presentation on "China's Growth Prospects and Risks" to the CFA Institute's "Investing in Emerging Markets Conference." Earlier on Oct. 19, China raised borrowing and deposit rates by 0.25% (25 basis points).

Should you worry about China's rate hike? Continue reading "ISI's Straszheim: China's interest rate hike is "tapping the brakes.""

More coverage of the CFA Institute's emerging markets conference:

- Notable quotes from the CFA Institute's emerging markets conference."
- Cautious optimism on emerging market stocks from SSgA's Hoguet
- Bubble? - Emerging markets scrutinized by CFA Institute conference

Reader challenge: What's the writing lesson from Physicians Mutual?

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You're getting smarter about writing investment and financial communications, so I'm giving you a challenge: Watch this video and then tell me what lesson it teaches writers.

Click here to watch the video and leave your comment.

LinkedIn's fatal flaw for financial advisor compliance

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LinkedIn has a whopping flaw for advisors who'd like to keep their compliance officers
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100% happy, and there's no solution in sight. At least, not to my knowledge.

The problem is records retention, which is at the heart of conservative management of compliance risks from advisor communications. Much of what you post to LinkedIn can be automatically saved and archived using solutions provided by third-party vendors. But there's no way to do this for messages sent via LinkedIn.

Continue reading "LinkedIn's fatal flaw for financial advisor compliance."

Also, watch my blog for a guest post by Bill Winterberg on how to manage LinkedIn message compliance. Coming soon!

Six tips for snaring reporters with your market commentary
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Chief investment officers, strategists, and portfolio managers sink a lot of energy and brain power into their quarterly market commentary. If you're among them, your return on investment should include greater visibility in the media.

Here are six tips to help you achieve your publicity goal.

1. Publish your investment commentary - or at least some brief observations - prior to quarter-end.

   Most newspapers publish their quarterly stock and bond market report the day after quarter-end. So they must conduct their interviews before asset management firms receive final benchmark returns and other analytical inputs. Journalists can't wait for you to polish your commentary. Consider writing a first draft of your quarterly commentary two to three weeks prior to quarter-end, so you can send it to reporters on the timetable that works best for them, not you.

Continue reading "Six tips for snaring reporters with your market commentary."

Guest post: "Investment analysts and social media"
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Pat Allen of RockTheBoatMarketing is one of my "go to" people when I'm looking for information on how asset managers use social media. If you're interested in tracking this topic, follow Pat's Twitter feed at RockTheBoatMKTG and check out her Twitter list of investment managers. If your interests focus more on financial advisors, then Pat's AdvisorTweets Twitter account is for you.

In her guest post below, Pat suggests that investment analysts and portfolio managers need to learn how to do research using social media or risk missing-or being late to obtain-information that influences the prices of securities.

Investment analysts and social media
By Pat Allen

Institutional analysts and investors rely most on information that comes directly from companies.

This was a finding in a Brunswick group survey that I remember reading and finding unremarkable. And yet it's increasingly obvious that corporate information can be relied upon for a company's plans and intentions-but how an organization moves forward will be influenced by a marketplace reacting in real-time.

Continue reading "Guest post: "Investment analysts and social media.""

Guest post: "What's a tomato got to do with getting your fund discovered?"
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Mutual fund marketing is the focus of this week's guest post by Dan Sondhelm. His post originally appeared on SunStar Strategic's FundFactor blog.

What's a tomato got to do with getting your fund discovered?
By Dan Sondhelm

Have you ever grown a tomato? If so, you know it's not as simple as just putting a seed in the ground. In fact, passionate tomato farmers often start their seedlings indoors several weeks before planting season. Once outside, they need a good dose of sunshine and the right amount of water, not to mention great soil, shelter from chill winds and a strong trellis. You get the idea.

Continue reading "Guest post: "What's a tomato got to do with getting your fund discovered?""

Investment Writing Spotlight: "A Tale of Two Recessions"
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"A Tale of Two Recessions" is the blog post by financial planner Brian Plain that we'll discuss in this "Investment Writing Spotlight." Thanks, Brian, for volunteering!

CRITIQUE
"A Tale of Two Recessions" hits a theme to which many readers can relate. Despite the official end of the recession, many individuals still feel as if their economic lives are in a recession.

Brian's blog post fits the category of "short and sweet." He offers short sentences, lots of white space, and an eye-catching graphic saying "Recession is over!" As a result, this post looks inviting. So many blog posts don't achieve this.

Continue reading "Investment Writing Spotlight."

Last month's reader poll:
Would you like to change my e-newsletter?
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You've got me thinking. Some of you would like to tweak my e-newsletter.

Here are the results of last month's poll asking "How should I change my e-newsletter?":

- 60% Don't change it

- 10% Offer a monthly reminder with link to complete newsletter
- 20% Shorten it
- 10% None of the above

Thanks for taking the time to reply! I'm thinking about how to keep you happy without spending more time on the newsletter. I'd run fewer articles, but that would upset the 60% who said, "Don't change."

Poll: Is the SEC's plain language requirement for Form ADV Part 2 a good idea?
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SEC-registered advisors must rewrite Part 2 of their Form ADV using plain language. The requirement takes effect in 2011.

You won't be surprised to learn that I favor plain language, but I'm curious to know what **you** think of the new requirement.

Please answer the poll in the right-hand column of my blog or leave a comment on "What do you think of the plain language requirement for Form ADV Part 2?"

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

Testimonial

"Some people can write about anything -- investments, squirrels or design -- and make it interesting."

--John Newton, Editor, *Interior Design* magazine

Quoted, linked or mentioned online
My tweets and blog posts are showing up in The Advisor Social Media Daily, created by Stephanie Sammons of Wired Advisor.

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!

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