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**Susan B. Weiner**  
**Investment Writing**

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The CFA Institute made me do it: A social media tale
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I didn't want to do it. I didn't want to develop a business presence on Facebook. LinkedIn, Twitter, and my blog kept me busy enough.

But then I heard that the CFA Institute had way more followers on Facebook than LinkedIn. How many? I forget the numbers I heard at the institute's 2010 annual conference, but more recent statistics include:

See the statistics and continue reading at "[The CFA Institute made me do it: A social media tale.](#)"

**Writing tip: Pop the balloon or make it your focus**  
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A stroll along San Antonio's River Walk inspired this writing tip because an out-of-place detail grabbed my eye.

A white balloon bobbed along the surface of the river. Once I spotted the balloon, I couldn't see anything else. Not pale gray stone walls. Not the greens or browns of shrubs and trees. Not the pale blue sky.

Continue reading "[Writing tip: Pop the balloon or make it your focus.](#)"

Guest Post: "Why use a mind map with clients?"
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A mind map can be a great tool for communicating with your financial planning or wealth management clients. Some people absorb information better in visual than written form. Even word geeks like me find mind maps useful. So I'm happy to have Alex Murguia,

managing principal of McLean Asset Management, explain how you can benefit from using a mind map to create a visual display of the most important information about each client.

Read Alex's explanation at "[Guest post: "Why use a mind map with clients?"](#)"

Stay tuned if you liked this post. I've got another mind map post coming.

**Information Density: Weakness or strength?**

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Are you hitting the right level of information density in your writing?

Continue reading "[Information density: Weakness or strength?](#)"

Guest Post: "Math and the Gender Gap: Does it affect financial planning?"

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My friend Laura Laing has written a book that demystifies math. She also writes an entertaining blog about math. I'm delighted to share her guest post about women, math, and financial planning.

Read Laura's post at "[Guest Post:"Math and the Gender Gap: Does it affect financial planning?"](#)"

**Reader poll: YOU pick the winner: Most reassuring titles for investors.**

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This month's poll is "[YOU pick the winner: Most reassuring titles for investors.](#)"

Different folks find different titles reassuring amid the stock market's ups and downs. This is what I've gathered from my call for "[Article titles that reassure investors.](#)"

Please vote for your favorite in the [poll that appears in the right-hand column of my blog.](#) If you have a better title, you can add it to the poll.

Last month's reader poll: How well do your clients know YOU? How can you tell?

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Last month's reader poll asked "[How well do your clients know YOU? How can you tell?](#)"

The top choice was: I figure they know something about me, but I don't have any proof.

Here are the poll results:

- **50% I figure they know something about me, but I don't have any proof.**
- **38% They know me very well. I can tell because they refer prospects who are perfect for me.**
- 13% They don't know me well because I'm always focused on them.
- 0% I have no clue.

Wondering why you should care about your clients knowing you? Here is [coach Suzanne Muusers'](#) take on this question:

Your clients should know you well enough that they feel comfortable coming to you first when they have an emergency. Having an authentic interest in your clients and sharing who you are leads to strong relationships. This means that in meetings with your clients, you should listen 80% of the time and speak 20% of the time.

### **More on writing and marketing**

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Here are links to more of my posts about writing and marketing.

- [BNY Mellon says "no" to "staying the course"](#)
- [Northern Trust's plain English ad](#)
- [Reader challenge: Risk management rewrite](#)

Where you can find me--online and in person

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#### **Weekly Tips newsletter available**

You can receive one easily digestible writing tip in your email in-box by signing up for my **Weekly Tip**. I launched this new publication in August.

To give you a sense of what you'll get, here are links to my August tips:

- [Focus on benefits, not features, in your marketing](#)
- [Get to the point quickly, or lose your web readers](#)
- [How to credit exhibits in your white papers](#)
- [How to make one quarterly letter fit clients at different levels of sophistication](#)

You can [add the weekly tips to your subscriptions](#). Assuming you already subscribe to this newsletter, after you input your email address you'll receive a link that will allow you to update your email preferences.



#### **My first webinar is in the works**

November 16 is the target date for my first free public webinar, tentatively titled "You!-The Secret of Great Blogs that Boost Your Readership." I'll provide more details later.

If you sign up to receive my "Events" emails, you'll receive timely reminders about my events.

#### **Bostonians, hold the date!**

You have three seconds to grab your reader's attention with your letter, according to a statistic published by RR Donnelley. That's why you'll benefit from my class, "Writing Emails and Letters People Will Read," which I will offer on March 13, 2012, through Newton Community Education.

**Testimonial**

"Susan's email/letter workshop for the NAPFA MA Study Group brought to life the benefits of better writing."



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 names or email addresses.

Thank you!

**Quick Links...**

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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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