



~~~~~

# Susan B. Weiner Investment Writing

**July 2012**

~~~~~

In this issue

[How to add personality and warmth to your financial writing--Part 1](#)

[Focus your marketing, says the "Financial Services Marketing Handbook"](#)

[Facebook likes and links for financial advisors vs. the rest of the world](#)

[Five things to stop doing in 2012](#)

Webinar replay available: "How to Write Effective Emails and Letters"

~~~~~

Emails are essential to your success as a financial advisor. They help you reel in new clients and satisfy your current clients.

For a quick overview of email essentials, check out the replay of my webinar, "[How to Write Effective Emails and Letters](#)," available at a discount for a limited time only.



I presented this webinar to good reviews from NAPFA Genesis in May 2012.

## **How to add personality and warmth to your financial writing --Part 1**

~~~~~

Independent financial advisors find personality is a powerful marketing tool. It's one thing that's unique to you. However, it is not always easy to infuse your writing with personality.

In this two-part post, I address five tools you can use to address a personality gap in your writing, starting with personal stories.

Continue reading "[How to add personality and warmth to your financial writing--Part 1.](#)"

Read Part 2 at "[How to add personality and warmth to your financial writing--Part 2.](#)"

Also check out these posts that were inspired by Part 1:

- [Dad's a Financial Planner I'm Scared for Life](#) by Roger Wohlner
- [A Valuable Conversation Worth Having](#) by Brad Wasserman

Thank you, Roger and Brad for sharing!

Focus your marketing, says the "Financial Services Marketing Handbook"

~~~~~

Targeting your prospects instead of marketing to everybody works best, as the [Financial Services Marketing Handbook](#) suggests with a powerful statistic.

Continue reading at "[Focus your marketing, says the 'Financial Services Marketing Handbook.'](#)"

**Facebook likes and links for financial advisors vs. the rest of the world**

~~~~~

What's sauce for the goose is sauce for the gander, or so the cliché goes. But financial planners regulated by the SEC and FINRA often can't use techniques promoted by social media gurus. This article discusses one such Facebook page technique.

Continue reading at "[Facebook likes and links for financial advisors vs. the rest of the world.](#)"

Five things to stop doing in 2012

~~~~~

To improve your communications in 2012, I propose five things you should stop doing.

See the list at "[Five things to stop doing in 2012.](#)"

**Reader poll: How quickly and often should you follow up with prospects for your financial services?**

~~~~~

This month's poll asks "[How quickly and often should you follow up with prospects for your financial services?](#)"

Gaining new clients is important to you. That's the whole point of your marketing. However, a blog post by Karyn Greenstreet suggests that you aren't making the most of a great opportunity: systematic follow-up with prospects who contact you.

Please vote in the [poll that appears in the right-hand column of my blog.](#)

Last month's reader poll: Advisor vs. Adviser

~~~~~

Last month's reader poll asked "[Which spelling is correct - advisor or adviser?](#)"

"Advisor" took the top spot. However, "adviser" had defenders, including *The Wall Street Journal's* Jason Zweig. He concluded "...advisers who call themselves advisors are being pretentious." You can [read his complete comment online](#).

Here are the poll results:

- **79% Advisor**
- 21% Adviser

### More on writing and marketing

~~~~~

- ["Amid Market Gloom, Fund Manager Fights Against Jargon"](#)
- [Website lessons from the Obama administration](#)
- [How can I come up with ideas for a weekly newspaper column on personal finance?](#)

Where you can find me--online and in person

~~~~~

### Where I'm quoted or mentioned

- ["Kitces: 11 blogs for all financial advisers to follow"](#) by Michael Kitces of Pinnacle Advisory Group and the [Nerd's Eye View](#) blog, includes my blog in his *Investment News* article.
- I'm quoted in "[Why is your money manager a mister to me?](#)" by Pat Allen at Rock the Boat Marketing. This is a fun piece.

### Testimonial

"I don't take the time every week to respond to your weekly tips. But I want you to know how valuable your tips are to me. You keep challenging me to pursue excellence in my written communication. Among other duties, I coordinate the publication of new material for our website. Thanks for the practical and creative ideas you share."



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...**

~~~~~

[Our website](#)

[Our blog](#)

[Our client testimonials](#)

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

Follow me on twitter	View my profile on Linked in	Find us on Facebook	Visit my blog
--	--	-------------------------------------	-------------------------------

Contact Information

~~~~~

phone: 617-969-4509

~~~~~

[Join Our Mailing List!](#)

Copyright 2012 by Susan B. Weiner All rights reserved

[Forward email](#)



This email was sent to jlernan@coldspringdesign.com by newsletter@investmentwriting.com | [Update Profile/Email Address](#) | Instant removal with [SafeUnsubscribe™](#) | [Privacy Policy](#).

InvestmentWriting.com | 30 Jerome Avenue | West Newton | MA | 02465