

Susan B. Weiner
Investment Writing



Investment Writing **Top Tips 2013**

from the newsletter and blog of Susan Weiner, CFA

Cut through the noise to reach your audience!
Practical communications tips for busy people

investmentwriting.com

Susan B. Weiner **Investment Writing**

Your communications with clients and prospects are essential to the success of your investment, wealth management, or financial planning firm. *Investment Writing Top Tips 2013* gives you information you can use to boost the effectiveness of your marketing, social media, and writing.

What people said about earlier editions of *Top Tips*:

Susan provides solid tips investment writers can use today to break through the chatter and effectively reach their target audience.

–**Bill Winterberg, CFP®, FPPad.com**

Susan's *2011 Investment Writing Top Tips* is chock full of informative, easy-to-implement, and very practical ideas that advisors (and others) can use right away. I strongly recommend this information if you are looking to stand out, to be a clearer communicator, or to increase your visibility and marketing efforts with prospects and clients.

–**Beverly Flaxington, The Collaborative**

If you're trying to promote your firm or yourself through social media, this is a great resource. I like this so much I sent it to my management team.

–**David Spaulding, The Spaulding Group**

This collection is a treasure trove of the best of Susan's best—a must-read for investment professionals who care about clear, effective communications.

–**Pat Allen, Rock The Boat Marketing**

In the age of social media, being able to convey your insights through words is essential to building influence. If you want to learn to become a better writer, there are some wonderful nuggets of writing wisdom in Susan's report!

–**Stephanie Sammons, Wired Advisor**

You CAN communicate better with your clients and prospects!
Read these tips from the newsletter and blog of Susan Weiner, CFA.

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BLOGGING:

3 tips for maximizing your guest blog's impact

What if you wrote a guest post and nobody realized you were the author? I've read guest contributions on blogs that hid their author's identity so well, I thought the host was the author. If you follow my tips, this won't happen to you.

1. Ask your host to insert your byline into the post.

When "By Jane Advisor" runs prominently near the top of the post, it's easy to identify the author.

2. Provide a headshot photo to run with your guest post.

Some readers respond better to visual cues than words. A photo leaves no doubt that the blog host is not the author.

3. Ask your host to run a brief bio, including at least one link.

A bio is your one chance for overt promotion when you guest-blog. Provide the bio to your host, rather than relying on him or her to write something suitable. Include at least one link in your bio. Good candidates: your website or your strongest social media page. Another possibility is to link to a landing page where you make a special offer to the readers of your guest post.

To see sample guest posts...

...click on some of the links in my "[Guest bloggers: 2012 in review](#)" post.

More on guest posts

Wondering how you can snare a guest post? Check out "[How to guest-blog on personal finance or investments.](#)"

BLOGGING:

How to add personality and warmth to your financial writing—Part one

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.

1. Personal stories

Telling personal stories is an obvious way to give a flavor of your identity. It's simplest if you're an advisor who has grappled with many of the same financial issues as your clients. For example, you may have struggled with how much allowance to give your children. A story about how you reached your decision—or how you communicated it to your children—is a great kernel for a blog post, if you're comfortable sharing.

Your personal story need not be directly related to a financial decision. I like how Jude Boudreaux of Upperline Financial writes about life lessons learned from his baby in "[Baby Steps Aren't Just for Babies](#)." Even non-parents like me can relate to a baby learning to walk. Jude takes pains to translate his little girl's first steps into lessons for you, the reader, rather than focusing solely on himself and his family. He concludes by asking, "What baby steps can you take today to continue your growth as a person?"

Looking for inspiration?

Here are more examples of financial planners who share personal stories:

- In “[Never Forget](#),” Jeff Rose of the Good Financial Cents blog writes a touching Memorial Day tribute to a fellow soldier.
- “[A Bit of Magic – The Beauty of the Human Spirit](#)” by Nathan Gehring of MyFirstFinancialPlanner.com discusses the amazing generosity of a 12-year-old girl that he encountered at a Financial Planning Association event.
- “[My Broken Wife and Your Financial Plan](#)” by Russ Thornton of Wealthcare for Women demonstrates nice use of dialog in his opening. He turns an experience with his wife into a call for his readers to act.
- Bradford Pine of the Bradford Pine Wealth Group shares a personal passion in “[My Personal Experience in Donating Bone Marrow/Stem Cells...Fight Leukemia and Become a Donor](#).” Again, and this is key, he makes his experience relevant to his readers.
- “[Wealth Lessons from Ten-year-old Joshua](#)” shows the vulnerable side of author Rob Pool of Fort Vancouver Investment Management. He also makes the point that “wealth means far more than just your bank account.”

You can [read the second part of this article online](#).

EMAIL:

Don't make this mistake in your email subject lines!

A quirky email subject line made me think my husband was spamming me. He graciously allowed me to use his example to remind you to choose your subject line's first words carefully.

Bad email subject line

Here's the email subject line as it appeared on my screen:



Can you see why I was concerned that my husband's email account had been hacked?

The problem: Your subject lines get cut off

Most people don't see or absorb your complete subject line. Why?

- Email software typically shows about 50 characters of your subject line on a PC
- Mobile devices shorten subject lines even more than computers
- People pay the most attention to your email subject line's first words. This is why I suggest that you:
 - Put the most important part of your subject line first
 - Put an action verb near the beginning if you're asking the recipient to do something for you. For

example, “Please tell me if you can attend July 11 meeting.”

- Start with an informative noun if an action verb isn’t appropriate. For example, “FYI, next committee meeting is August 22.”

A better subject line for my husband

I’ve been mulling over better subject lines for my husband’s email. I think the following would work better:

- Shredder question: Does yours use oil or lubricant sheets?

EMAIL:

Email writers, think about this quote

Think about your reader. This is always important when you write.

When you want the recipient of your email or letter to act on your information, heed the following advice.

“...give me the information in the order I can use it.”

– Lee Wood, quoted by Kenneth W. Davis
in *The McGraw-Hill 36-Hour Course: Business Writing
and Communication*

For example, don't start by talking about the envelope you've enclosed.

Instead, first ask your client to read the form and then sign it in the spots you've marked with a big red X. Only then should you ask the client to mail it in the self-addressed, stamped envelope.

Be kind to your readers. It'll pay off in better results and relationships.

INVESTMENT COMMENTARY:

Ideal quarterly investment letters: Meaningful, specific, and short

Investment managers' quarterly investment letters should be meaningful to clients, specific to the manager, and short. These are the key conclusions I drew from [my quarterly investment letter survey](#).

Meaningful content

“Clarity,” “insight,” and “candor” were the most popular answers to the question, “What’s the ONE WORD that best describes what investment managers should strive for in their quarterly letters to clients?” I think these popular answers can be summed up by the term “meaningful content.”

The image below gives a visual overview of the responses. Type size is proportional to the number of respondents choosing a word as their answer.



Here are examples of how respondents explained their word choices. I made some minor changes to their quotes to smooth them out.

- “Clarity” suggests that you have done the reading, research, analysis and due diligence on what you’ve taken in. You have synthesized it. Rather than repeating a litany of what you’ve read, you provide a simple summary of the key points you’re bringing to their attention and why.
- Clarity. Clients appreciate honesty, and the best way to demonstrate honesty is to be clear in what you are saying. Always consider the clients’ perspective. Put yourself in their shoes and ask yourself what is important / relevant, and how you would want it shown. And be honest with your answers.
- Candid. Warren Buffet discusses both types of investment – the ones that made money and the ones where he lost money – candidly.
- Clarity – The world and financial markets are very dynamic, intertwined, and complex. The ability of an investment manager to take seemingly disparate and complex topics and distill them down to an explainable relationship...is rare but very value-added.
- Needs to reflect the voice of the investment team, not marketing fluff.
- Relevance – As a customer, it’s about my money, my future, my family. It’s not about your strategy, your brilliance, your research department. I need to know: Can I count on you?

Content specific to the manager

The survey asked respondents to specify whether various letter components were very important, important, somewhat important, unimportant, or not applicable. Respondents placed the highest importance on the manager's investment strategy and review of the past quarter's portfolio performance. Here's the rank order:

1. Manager's investment strategy
2. Review of the past quarter's portfolio performance
3. Manager's market outlook
4. Graphs, tables, or other illustrations
5. Client-specific portfolio returns
6. Stock-specific or security-specific comments
7. Sector-level strategy
8. Review of the past quarter's market and economy
9. Something not listed above

These results say to me that readers want content they can't find elsewhere.

Here are some relevant responses:

- The investments are a commodity...the client bought the firm and that brand should be consistently presented in all interactions.
- What is missing in the vast majority of reports from managers is any genuine clue as to how and why they made/lost money. Market or asset class reviews or forecasts and returns summaries are ultimately meaningless if the manager doesn't understand the drivers of his return. I like to see a thorough and

- genuinely insightful “attributions analysis” that makes it plain to the reader that the manager knows precisely why/how/where the money was made.
- Needs to be something more than what I get from Bloomberg or WSJ commentary. I want to understand their outlook, and how that shapes their strategy.
 - Manager should include “what went right, what went wrong” during the quarter relative to investment performance. In other words, performance attribution at a high level.

Keep it short

More than 40% of respondents thought a quarterly investment letter should run two pages or less. The next most popular answers were lengths of two to three pages (21%) and three to four pages (18%). A length of five pages or more was the least popular response.

Respondents favor shorter letters that are reader-friendly, as their comments below show.

- Investors want you to tell them what **THEY** need to know, not everything **YOU** know!
- I read a lot of quarterly letters, and I selfishly would like to be able to pull out the important nugget(s) quickly. More importantly, as an investment advisor I know that my clients will not put a lot of time into reading these letters. If they look long and boring, they simply won't bother.
- As an investment manager researcher, I read numerous quarterly commentaries from our sub-advisors. The managers that are able to deliver the highlights clearly

- and in a concise manner stand out because they are better able to communicate their message to me and our clients.
- In my experience in investment communications, I've learned that less can be more. Get to the point quickly! Most financial advisor (and investors) don't have much time to read and are in a state of information overload. Many receiving a three-page commentary will put it in their "read later" pile (meaning it may never be read). However, if they received a shorter commentary (one-page would be ideal), they might read it upon receipt, getting information in a much more timely manner.
 - People are busy and finance isn't always the easiest or most scintillating topic; keep it short and sweet so you can keep your clients engaged and informed. Value their time.
 - After three pages, most people get bored 😊

Making it personal

It's not easy to make quarterly letters feel personal and customized without spending lots of time on them. Some of the techniques that respondents suggested for achieving this included:

- Address the reader directly by using "you"
- Integrate data from portfolio accounting
- Know the type of client that is attracted to your investment strategy and speak to that client's biases and need for information.
- Answer the question, "what is in it for them?"

- Add a personal note within the body of the letter. “I took my son shopping for school supplies at Walmart...” and if there is an investment tie-in, so much the better.
- There should be a personal touch regardless of how long it takes. These clients give us their hard earned money to manage and we should take time to report to them.

Making it well-written

A number of comments supported my belief that letters should be well written.

- I’m busy and I read a lot of investment letters. I don’t have time to reread investment letters in an effort to understand what the manager is really trying to tell me. I want a straightforward letter that I only have to read once to understand.
- You must write to the level of the average individual, not at a level that will impress your peers. Your clients would not be working with you if they did not believe you are intelligent...you don’t have to show them how intelligent you are by spewing out words that fly over their heads. If you want personalized and relevant letters, you must bring yourself to their level.
- I try to speak in my natural voice, rather than a “writing” voice. I also find that humor and self-deprecation (on non-professional issues) resonate with clients.

Thank you, CFA Institute LinkedIn Group members and other respondents!

I am very grateful to all of the people who responded. Your comments made this topic come alive. I wish I could have included more of them.

I believe most of the survey respondents are financial or marketing professionals, but I didn't collect their demographics. However, I suspect that members of two of my LinkedIn Groups—CFA Institute Members and Financial Writing/Marketing Communications—were particularly generous with their contributions.

INVESTMENT COMMENTARY: Key lesson for investment commentary writers from my professional organizer

My personal possessions aren't as neatly organized as my writing, so I've worked with several professional organizers. They've taught me a lesson that is critical for folks who write market, economic, or portfolio commentary: **Put like with like.**

Just as I should keep my overabundant collection of sweaters in one drawer, rather than scattered over all of my dressers, you should organize your commentary topics in a logical manner. This isn't easy when you're an investment professional who is under pressure to churn out commentary at the end of the quarter, right when you're busy with other quarterly tasks.

How does this translate into quarterly commentary? For example, you might separate commentary into sections on the economy, stocks, and bonds. I imagine many of you already do this. However, you can take this one step further.

Use some sort of organizing principle within each section. For example, don't dump economic statistics in any old order. Consider dividing them into positive and negative indicators, or employment, manufacturing, and income statistics. This kind of organization makes it easier for your reader to grasp your message.

Organize your information well, and you'll make it as easy for your readers to find your message as it would be for me to find my navy blue cardigan if I divided my sweaters into cardigans vs. pullovers and then sorted them by color.

SOCIAL MEDIA:

Legal danger for financial bloggers: Two misconceptions, three resources, one suggestion

No financial blogger wants to get in trouble with the law, become liable for financial damages, or tarnish his or her reputation. You've probably thought about compliance with laws governing advisors registered with the SEC, FINRA, or other regulators. But what about copyright laws?

I believe a significant number of advisor-bloggers are guilty of copyright violations when they share information written by others. I have come across several well-meaning advisors who mistakenly believed they acted within the law when they copied all or part of other people's blog posts. In fact, they had broken the law and could have been on the hook for financial penalties.

To help you cope, I've written this article sharing two common misconceptions, three resources, and one suggestion to keep you on the right side of the law and make everybody happy.

Misconception #1: If you credit and link, that's enough

Most advisors and other financial bloggers know you shouldn't copy someone else's work and pass it off as your own. However, I've seen advisors who think it's okay to copy an entire newspaper article on their blogs as long as

they name the author and publication details in addition to linking online to the original article.

This is not correct, as you'll realize when you check out my resource section below.

Misconception #2: If you only copy XXX words, it's okay

There is no word-count rule that protects you from charges of copyright infringement. If you use the “heart” of the work, you're in trouble, as explained in the “[Amount and Substantiality of Portion Used](#)” section of the University of Minnesota University Libraries' excellent web pages on copyright.

In fact, even short phrases may be protected by copyright, according to “[Copyright Protection for Short Phrases](#)” in the Copyright and Fair Use section of the Stanford University Libraries website.

How can you share content without violating copyright? Check out the resources in the next section.

Resources for “fair use” of copyrighted material

Lawyers use the term “fair use” to describe the legal use of copyrighted materials. Here are two websites and a printable checklist that will help you assess whether the amount of another author's text that you reproduce in your blog post is acceptable. There are no short, easy guidelines that fit all situations.

1. “[Understanding Fair Use](#)” is a good overview of the issues, presented by the University of Minnesota’s University Libraries.
2. “[Fair Use](#),” a book chapter on this topic, is available on the Stanford University Libraries website.
3. “[Checklist for Fair Use](#),” the printable checklist from the Cal State Fullerton Library, will help you think through the issues for specific materials. You’ll find something similar online at the U. of Minn.: “[Thinking Through Fair Use](#).”

Suggestion to ensure “fair use”

When in doubt, ask the author for permission to reproduce the content on your blog. Don’t assume they’ll say “yes.” However, you may score points with writers who are anxious to spread their message. If the writer says, “No,” at least you know to tread carefully in how you use the author’s content.

By the way, I don’t oppose bloggers summarizing or adding their own spin to other people’s content. But please don’t violate copyright by exceeding what is considered “fair use.” Speaking of authors, I’d like to thank the writers on Freelance Success, including Tania Casselle and Erik Sherman, who helped me find resources for this blog post.

SOCIAL MEDIA:

Videos: 3 ways to make them palatable for video-haters like me

I HATE videos. As a lover of the written word, it annoys the heck out of me when people share information only in video or audio. However, there are steps you can take to make video and audio more palatable to cranky folks like me. You'll find three suggestions below.

Technique 1: Add minute markers

Looking for the easiest, fastest solution? Then, list your video's major shifts of topic accompanied by the time the shift occurs.

For example, imagine a Q&A on investing in emerging markets. The text accompanying your video might look something like this:

00:00	Introducing Ms. EM Expert
00:30	What are emerging markets?
01:40	Reasons to invest in emerging markets
03:25	Risks of investing in emerging markets

This format lets me figure out what, if anything interests me. Then I can fast-forward to the good stuff.

Technique 2: Summarize the key points

A written summary of your video's key points will make people like me even happier. However, you'll find it more time consuming than Technique 1.

Your write-up need not be comprehensive. Just give me the highlights. For example, if we continue to use the emerging markets example, you could give a brief definition of emerging markets, followed by a list of the pros and cons of emerging-markets investing.

Technique 3: Provide a transcript

A transcript — a word-by-word record of your video conversation — is the most time consuming, but it also provides the most information of the three techniques I discuss in this blog post. I like that I can search the transcript for specific words and phrases.

You can make transcripts less time-consuming by outsourcing to a professional transcriptionist. To improve the transcriptionist's accuracy, provide a list of terms and names that may not be familiar to someone outside your field.

Even with a list of terms, don't expect your transcript to be perfect. Transcription isn't easy. Also, human beings don't speak in perfect sentences. You'll need to review and edit the transcript word by word. This is why I'm not a big fan of publishing transcripts.

If your video features your voice exclusively, you may be able to get it transcribed using voice recognition software. Dragon Naturally Speaking is one option. Again, you'll need to make corrections.

WRITING: 5 things to stop doing in 2013

To improve your communications, I propose five things you should stop doing in 2013.

1. Sending emails with missing or poorly written subject lines

For starters, never send an email with an empty subject line. People like me often delete those emails, assuming they're spam. Another subject line "don't": keeping the same subject line even after the topic has changed.

If you're writing to request an action, put that action in your subject line.

If your email is simply an FYI, say that in your subject line. Whatever the purpose of your email, communicate that in your subject line.

For more on emails, see "[Top four email mistakes to avoid when you've got a referral](#)" and "[Quick email tips for financial advisors and clients in my guest post.](#)"

2. Publishing or sending any written communication without proofreading at least once

Mistakes, especially stupid mistakes, make people wonder about your intelligence and attention to details.

Even writer geeks make mistakes. I am the poster child for that. I was so excited about finding a Strunk and White grammar rap video, that I posted it to my blog without proofreading my post. Oops! An obvious typo sneaked in.

3. Not blogging because you think your writing isn't good enough

If you have a valid reason to blog, you can find a way to make it work. Keep your blog posts short. Use audio or video, if you're more comfortable in those media.

4. Avoiding social media

Social media isn't going away. Dip your toes in the water. Get on LinkedIn and connect with as many people as possible, even if your compliance department limits your activity. You may be surprised by what you discover.

5. Ignoring your most common writing mistakes

You have lots of company if you're making "[Bloggers' top two punctuation mistakes](#)." If you've moved beyond those mistakes, you may benefit from [my favorite online resources for grammar, punctuation, and word usage help](#).

Thank you, Dorie Clark for inspiring this post!

Clark's "[5 Things You Should Stop Doing in 2012](#)" is a good read.

WRITING:

Colons and bullets: Keep 'em together or tear 'em apart?

I'm a big fan of bulleted lists. They're reader-friendly because, when used properly, they're easy to scan. But I've gone back and forth on how to punctuate the text introducing a list of bullets. I always used a colon before the list until a friend told me that was wrong. However, other friends chide me when I skip the colon.

To put an end to this argument, I'm reviewing some opinions on this topic.

Use a colon to introduce bullet points

“End your introduction with a colon, which serves as an anchor,” says Bryan Garner in the section about bullets *Garner's Modern American Usage*.

Use a colon to introduce lists

Many texts don't explicitly discuss the combination of colons with bullets, but they discuss colons preceding lists. “Use a colon to introduce a list that appears at the end of a sentence,” say Michael Strumpf and Auriel Douglas in *The Grammar Bible* (p. 426). My 2007 Associated Press Stylebook says, “The most common use of a colon is at the end of a sentence to introduce lists, tabulations, texts, etc. (p. 325).

“Following” or “as follows” demands a colon

Other texts don't explicitly mention bullets, but give mixed opinions about colons preceding lists. For example, my 1982 copy of *The Chicago Manual of Style* (CMOS) says, “A colon is commonly used to introduce a list or a series” (p. 149). It also specifies that “The terms *as follows* or *the following* require a colon is followed directly by the illustrating or enumerated items or if the introducing clause is incomplete without such items.” My 1974 copy of *Words into Print* agrees these “follow” phrases require a colon.

However, things get complicated after that.

Here are some of the situations when you should skip the colon after the introductory phrase, according to CMOS (all citations on the same page).

1. “A colon should not be used to introduce a list or object of an element in the introductory statement.”— *Words Into Print* seems to agree, saying, “When the introduction is not a complete sentence and one or more of the items of the list are need to complete it, no colon or dash should be used” (p. 181).
2. “If the list or series is introduced by expressions such as *namely*, *for instance*, *for example*, or *that is*, a colon should not be used unless the series consists of one or more grammatically complete clauses.”

Grammar Girl’s two-part rule

Mignon Fogarty, better known as Grammar Girl, suggests a simple two-part rule in “[Formatting Vertical Lists.](#)”

1. “If your lead-in statement is a complete sentence, use a colon at the end to introduce your list.”
2. “On the other hand, if your lead-in statement is a [sentence fragment](#), I recommend that you don’t use a colon.”

I like rules that are easy to remember. They boost the likelihood that I’ll punctuate consistently.

WRITING:

How I managed my presentation-writing anxiety

I freak out every time I have to write a new presentation. Well, not literally, but my anxiety does run wild. However, I managed to tame my most recent jitters with an exercise from life coach Cheryl Richardson.

In “[Break the Spell](#),” Richardson says,

“The minute you start worrying about something, stop and congratulate yourself for being so present and aware. Then, put pen to paper and list at least five positive outcomes you’d most like to have happen. Keep repeating these present-focused, positive statements throughout the day and notice how the energy starts to shift.”

Here are my five positive outcomes:

1. The presentation is well-organized.
2. Each member of the audience learns something that helps them write better.
3. I come up with new ways of explaining things to people.
4. My email list expands.
5. My presentation helps me land new clients.

This exercise calmed my nerves enough that I could focus on writing my presentation. I hope it helps you, too.

WRITING:

Nice analogy for asset allocation

A good story or analogy can boost the power of your communications. It will linger long after the rest of your conversation fades.

I like the following example, which I found in “[Tuning up implementation of modern portfolio theory](#)” by Scott MacKillop:

Now let’s talk about combining managers in portfolios. The legendary football coach Knute Rockne said: “As a coach, I play not my 11 best but my best 11.”

This is how we should build portfolios.

I’m no football fan. I won’t even watch the Super Bowl. But this quote resonated with me. I threw my copy of *Investment News*, where this appeared, into my office so I could share it with you.

WRITING:

Your mother and the “fiscal cliff”

Talk to your mother before you use financial vocabulary in your communications. That’s one message I took away from “Guide to the Markets,” presented by Andres Garcia-Amaya, a vice president with J.P. Morgan Funds, on September 29, 2012 at FPA Experience 2012 in San Antonio, Texas.

Revealing talk with mom

Garcia-Amaya recalled discussing the “fiscal cliff” with his mother. My paraphrase of his comments follows below.

G-A: Mom, what do you think about the fiscal cliff?

Mom: Oh, it’s so scary.

G-A: Mom, do you know what the fiscal cliff is?

Mom: I have no idea.

Bottom line? Don’t assume your clients and prospects are familiar with financial vocabulary. Test your communications on members of your target audience. Avoid technical terms or explain them briefly.

Market outlook: Risks create opportunities

Garcia-Amaya’s presentation focused on markets, not his mom or communications. He made the point that financial risks and bad news create opportunities for long-term investors because they depress valuations. Also, as Garcia-

Amaya noted, \$10 trillion is sitting on the sidelines. That's bigger than the \$9.7 trillion size of the entire U.S. mortgage market. When those funds flow back into the market, they should boost prices.

Garcia-Amaya's current investment preferences include the following:

- U.S. rather than non-U.S. stocks—"The U.S. is the nicest house in a crummy neighborhood."
- Emerging market debt—The emerging markets' real gross domestic product (GDP) is growing and they have low net debt-to-GDP ratios.

About Susan B. Weiner Investment Writing



Susan Weiner, CFA, helps financial professionals increase the impact of their writing on clients and prospects. She writes and edits articles, white papers, investment commentary, web pages, and other communications for leading investment and wealth management firms. Susan has presented to CFA societies across the U.S. and Canada on “How to Write Investment Commentary People Will Read.”

Susan knows how to use language as a financial professional and a journalist. Before becoming a freelancer, she was director of investment communications at Columbia Management Group, a trustee at Batterymarch Financial Management, and a staff reporter for a weekly mutual fund publication.

You can win new business and retain more clients with effective communications. In addition, you can leverage your time—or your executives' valuable time—by outsourcing writing or editing.

Call Susan Weiner at 617-969-4509 or contact her via email at info@investmentwriting.com to learn how she can help.

Investment professionals, financial advisors, and the sales and marketing staff who support them, have praised [Susan's workshops](#) on writing investment commentary, emails, and blog posts that help attract and retain clients. She is also the author of *Simply Irresistible: Writing Financial Blog Posts People Will Read*.

To read more of Susan Weiner's tips, subscribe to her [e-newsletter](#) or visit her blog at <http://investmentwriting.com/blog>.