

## What clients say



**“Susan made a complex technical topic interesting and easy-to-read in our White Paper.”**

**– Business development VP,  
Financial planning firm**

**“We got incredible mileage out of our communications when Susan repackaged them for us in presentations, emails, newsletters, and on the web.”**

**– Chief operating officer,  
Investment management firm**

**Call or e-mail for a free trial subscription to our e-newsletter.**

“The newsletter always adds value with industry news or a tool I can use.” – SVP, investment management firm

**Susan Weiner, CFA**  
Investment Communications

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## Susan Weiner, CFA



**Investment  
Communications**

**Strategic communications  
to help investment-related  
companies win new  
business and retain existing  
clients.**

**BUSINESS CHALLENGE:**

You want your firm's expertise to distinguish you from competitors, but your executives' insights are buried in complex concepts and technical jargon.

**SOLUTION:**

Call Susan Weiner, CFA at 617-969-4509 so she can communicate your expertise in easy-to-read language.

**Why Susan Weiner, CFA?**

- CFA charterholder and Harvard University graduate
- Experienced manager of investment-related marketing communications for major asset management firms
- Seasoned reporter for business and financial publications
- Published in *American Banker*, *Boston Globe*, *CFA Magazine*, *Financial Planning*, *Mutual Fund Market News*, *Registered Investment Advisor*

**Expertise writing about:**

- Outlook for equity and fixed income markets
- Investment strategy, philosophy, process, and performance
- Separate account management
- Mutual funds and their distribution channels, including retirement plans and offshore funds
- Estate and financial planning
- Legal, compliance and tax issues

**Helping you to reach:**

- Institutional, high net worth and retail investment clients and prospects
- Investment portfolio managers, relationship managers, and salespeople
- Mutual fund executives
- Investment advisors
- Investment consultants and fund sponsors
- Website users
- Business publications
- Referral sources, such as lawyers and accountants

**Formats:**

- White papers
- Bylined articles
- Sales and client presentations
- Web pages
- Press releases
- Brochures

**RECENT PROJECTS**

- **Positioned a leading mutual fund firm as a "thought leader"** by writing brochure describing how to structure an international portfolio.
- **Provided essential component of new product introduction** by writing white paper uncovering the associated risks and opportunities.
- **Introduced third-party marketer to institutional investment managers, consultants and fund sponsors** by creating sales presentation used to launch its business and website.
- **Attracted and retained clients** by capturing in-house estate planning expertise in article for brokerage firm website.