

## Writing Rules for Financial Advisors

Good writing is one of the most underrated advantages a financial advisor can have. It touches nearly every trait clients value: clarity, empathy, expertise, and trust. Writing lets you show what you know. It helps you personalize information in a way that proves you understand your clients' concerns. And it allows you to translate complex topics into something people can understand and act on.

I chose these writing rules with advisors in mind: the emails you send, the planning notes you write, the quarterly newsletters you publish. They come from some of the most influential writers, thinkers, and communicators — because the principles of good writing apply across every field.

### 1. “Write the way you talk. Naturally.” DAVID OGILVY

#### Why it matters for advisors:

People don't connect with corporate-speak. They trust a smart human who talks like a normal person.

#### Try this:

Before you send an email or newsletter, read it out loud. If you'd never say it to a client in conversation, rewrite it.

### 2. “Omit needless words.” WILLIAM STRUNK

#### Why it matters for advisors:

Attention is scarce. Shorter sentences get read. Long blocks of text get skipped. The surest way to arouse and hold a client's attention is by being specific, definite and concrete.

#### Try this:

Turn “Due to the fact that markets are experiencing increased volatility...” into “Because markets are jumpy...” Do that everywhere.

### 3. “Never use a long word where a short one will do.” GEORGE ORWELL

#### Why it matters for advisors:

“Utilize strategic asset allocation to optimize risk-adjusted returns” loses people. “Mix investments to balance risk and growth” makes sense.

**Try this:**

Search your draft for words like “utilize, proceed, initiate, numerous, therefore, however.” Replace with “use, go, start, many, so, but.” This isn’t a strict rule. But the simpler word is almost always the right word.

**4. “Write with a specific person in mind.” WARREN BUFFETT**

**Why it matters for advisors:**

Writing to a real person gives your work focus and warmth. Buffett pictured his sisters — smart, attentive, but not financial experts — which helped him stick to plain English.

It also helps you write in a way that makes each reader feel you’re speaking directly to them. As the ad man David Ogilvy advised, “Don’t address your readers as though they were gathered together in a stadium. When people read your copy, they are alone.”

In other words, if you try to write for everyone, you end up writing for no one.

**Try this:**

Pick a real person to write to — maybe a favorite client, the one who is smart but hates math. Write every email and blog post specifically to them. And use “you” far more than “we,” especially on your website. Financial planning is personal; your writing should feel like a one-on-one conversation.

**SAMPLE END**