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The Investment Writing Handbook: How to Craft Effective Communications to Investors (Wiley Finance)

Assaf Kedem

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This book will cover the essential principles of developing a range of communications and literature for investor consumption, such as research papers, intellectual capital (including white papers, investment commentary and educational materials), product and marketing literature, requests for proposals (RFPs), presentations, and investor letters.

Investment writing is one of the primary sources of influence on investors' attitudes. It can educate and inform their decisions, shape their opinions, and drive their behavior. Virtually all firms need to communicate regularly to their clients, but there is currently no prescriptive guide on how to write effectively for the investor. This handbook meets the need of investment professionals for such a guide and explains all the basics of investment writing in accessible, engaging and handy terms, replete with real-life examples encountered during the author's tenure at the marquee financial institutions he's served.

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