Business Writing For Financial Professionals

Description:
This training on business writing will provide attendees tools and tips for effectively writing financial documents for diverse audiences. Learn best practices for getting an immediate response to any written document.

A study by the College Board's National Commission on Writing concludes that a third of employees in United States blue-chip companies write poorly, causing corporations to spend as much as $3.1 billion annually on remedial training. This problem is especially significant as the flattening of the global marketplace has increasingly burdened financial professionals to write high-profile, complex documents for diverse audiences on the fly. They often perform this essential work in diverse locations, such as commuter trains, hotel lobbies, and conference rooms during fast-paced, noisy business meetings, and under exceedingly tight time pressures. While many financial professionals benefit from using templates when developing major documents, circumstances often demand they think on their feet by either adapting the template to the situation or abandoning it for an alternative method.

As a result of these demands, writers ranging from tax consultants and investment risk analysts to equity research reporters and sales forecasters need a toolbox of memorable and practical strategies, techniques, and tips that will guide them through the writing process. This webinar includes the key principles of focused, high-impact writing regardless of the financial document. Working through the phases of revising (ideas), editing (expression), and proofreading (overlooked errors), this session looks at the rewriting process from these levels:

1 - the document level of purposefulness;
2 - the paragraph level of emphasis, unity, coherence, and visual appeal;
3 - the sentence level of impact, clarity, conciseness, consistency, and correctness;

Course Objective:
- Focus the audience on the purpose of the message
- Determine the appropriate level of content
- Organize data to focus the reader
- Heighten the importance of facts to address the reader’s concerns
- Four levels of quality controlling finance-related messages
- Using a structure that reinforces the purpose
- Emphasizing key points through solid paragraphing
- Employing formatting devices to guide readers through complex data
- Highlighting the relevance of data through transitions
- Editing sentences for clarity through active voice
- Applying the principles of conciseness to get to the point
- Maintaining a consistent message through parallel structure
- Remedy the most prevalent sentence errors that compromise the quality of language

CPE Credits - 1.5 / Field of Study - Specialized Knowledge & Applications

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