

## ***InvestmentNews' mission is to provide accurate, breaking news to the growing ranks of America's financial advisers and the financial planning industry.***

To accomplish this, *InvestmentNews* reporters need you. Your willingness and your colleagues' willingness to share information allows our reporters to break critical stories about developments within the industry. Our purpose is to increase the information flow between and among the various sectors of our audience.

As you talk to our reporters, remember that they are evaluating your information in terms of three questions:

### ***Is it news? Is it fair? Is it accurate?***

We recognize that some people are uncomfortable talking to reporters because they don't know what to expect. To assist you, [here are some useful tips](#).

#### **1. The telephone works both ways.**

If you think you have an interesting story to tell or some insight into a particular issue, and an *InvestmentNews* reporter doesn't call you or visit you, call him or her. *InvestmentNews* reporters and editors are always looking for news. And once a reporter or editor knows you, you are likely to be called in the future.

#### **2. If at all possible, deal with the reporter yourself.**

Don't shuffle him or her off to a public relations person. The reporter wants your expertise. When your comments are filtered through a public relations person, there's a risk that questions or answers will be garbled by someone without knowledge of the subject matter.

#### **3. Respond promptly to a reporter's call.**

Reporters are on tight deadlines, and their calls mean they have identified you as someone with knowledge who can help make their story complete, balanced and accurate.

#### **4. Set the ground rules for the interview at the outset, but understand the reporter might not agree to them.**

As soon as someone says, "I am a reporter," assume anything you say may be used in print, quoting you by name, title and company affiliation. Unless you state otherwise at the outset, you are on the record.

Off the record means you don't want to see anything you say in print. But you must ask the reporter if he or she wants to hear "off the record" information before stating it. Reporters might not agree, preferring instead to pursue the matter elsewhere. If they have listened to your information "off the record" they might appear to violate your confidence when they use the same information, but gained from other sources.

Not for attribution (often confused with "off the record") means: "don't quote me but..." The reporter may use the information, but not identify you as the source. As with "off the record," it must be stated at the beginning of the interview. Some reporters will continue with the interview anyway, but *InvestmentNews* discourages the use of anonymous sources in stories.

#### **5. Assume good intentions on the part of the reporter.**

*InvestmentNews* reporters have no axes to grind. Their only interest is in accurately and fairly gathering and disseminating news about the industry they cover. They are not normally your adversaries.

#### **6. Speak English to the reporter.**

*InvestmentNews'* reporters are highly skilled journalists and they are quick to catch on, but they don't know as much about your area of expertise as you do. Please keep jargon to a minimum.

### 7. Never say: "That is a dumb question" to a reporter.

The apparently dumb question is an effort by the reporter to clarify, to understand and not to assume he or she knows the answer. Remember, the reporter is taking the place of thousands of readers who do not have the opportunity to ask you to explain what you mean, and who might not have as much expertise or information as you have.

### 8. If a reporter asks a dumb question and you can't or don't want to answer, say so and explain why.

If you know of someone else who can better answer the question, refer the reporter to that person and, if possible, provide the other person's name and phone number. Don't stonewall. Denying the obvious destroys your credibility.

### 9. Don't rush to answer the questions.

Take a few moments to compose your thoughts. If you need to gather the facts and figures, ask the reporter to wait while you do so. And speak slowly. If you rush, the reporter might not get a full and accurate quote, or might get a garbled explanation of your point.

### 10. Don't ask to see a story before it is printed.

*InvestmentNews*, like most publications, refuses for several reasons to allow sources to see stories before they are printed. First, too many sources nit pick their own

comments, and even try to censor them. The late Sen. Everett Dirksen once said, "'I've been misquoted' often means 'I said it but now wish i hadn't.'" Second, stories generally contain information from more than one source, and no member of the public should have access to that information before any other member.

### 11. *InvestmentNews* discourages its reporters from reading back quotes to sources.

We do not have a research staff that can handle that chore, and reporters generally must move on to new stories as soon as they have completed their current ones. The decision whether to read back quotes, however, is entirely at the discretion of the reporter. Most will resist because of the time it takes and because it implies a lack of confidence in them. If a reporter should agree to read back your quotes, you will only be allowed to make substantive changes to correct errors. And if you are not available when the reporter calls, he or she probably will not call a second time.

### 12. Feel free to follow up.

If you believe the reporter quoted you inaccurately, by all means follow up with a call to the reporter or editor, or with a letter to the editor.

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