

Episode 0

BILL COPPEL

Hi, this Bill Coppel, and welcome to The Next Frontier. Before I tell a little bit about this podcast, I really want to start by sharing with you why we started it. I've been in the financial services business for more than 30 years. I started out as a financial advisor, and I've held numerous leadership positions. And I believe that the industry is at a tipping point. The role of the advisor and what investors really value is rapidly changing. We all know automation and technology impact our everyday lives, but it's also impacting our businesses. In fact, today, we're in the midst of a tsunami of digital disruption. And it's shaking the very foundations of established institutions, industries, and service-based businesses like ours. It's reshaping every aspect of our lives, our culture, how we conduct business, and even how we view the world.

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And whether you agree with me or not, I believe technologies like algorithms and artificial intelligence will do as good a job, if not better, at managing money than individuals. And this reality challenges what most advisors believe is their real value, managing money. I'm not so sure that's the case anymore. That's what we're here to explore, the evolving role and value of a trusted advisor in The Next Frontier. Our goal is to engage our audience in a new conversation, a conversation that will challenge you to think differently about your role in this digital paradigm and how you're going to create value for the clients you serve. Using digital disruption as our backdrop, we'll explore themes like how digital is changing client sentiments and expectations, how will the business of advice and guidance need to shift in order to remain one, relevant; and two, valued, say, more than a chatbot. And finally, what skills will financial advisors need to survive in this new world?

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Over the years, I've been very fortunate to meet and learn from experts and thought leaders from across a number of disciplines and businesses, everything from medicine and psychology to education and marketing and even the hard sciences. I've even met some great innovators. It's really time to look outside our industry and draw on the experiences of other professionals and service-based business and learn how they're navigating the digital paradigm. I'm excited to bring these guests to you to tell their stories and share new ideas. I hope you'll join us and be a part of changing the conversation. Together, we can shape the future. You can listen and subscribe to The Next Frontier anywhere you get your podcasts, today. Or you can visit our website, firstclearing.com.

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