

Transcription details:

Host: Bill Coppel, First Clearing Chief Client Growth Officer

Transcription results:

Speaker	Text
Intro	Welcome to the Next Frontier where we examine what the role of the financial advisor will be in a world where we're living longer, more tech-reliant, and bombarded with information 24/7 as we navigate constant uncertainty and accelerating change. Our mission is to spark new conversations that explore the future of advice by rethinking the value we deliver. Join us as we look at the evolving advice business and explore the opportunities that lie ahead for an industry in transition. It's time for a new conversation. Are you ready to weigh in?
BILL COPPEL	Hi, this is Bill Coppel, and welcome to The Next Frontier. We launched The Next Frontier podcast in July of 2018, and over the past 3 years and more than 75 episodes, we covered a lot of ground, exploring the impact of digital disruption, the changing industry landscape, and what it means to deliver value in the evolving advice business.
BILL COPPEL	With the traditional role of the financial advisor under siege, our mission was to help advisors transition from picking stocks and building portfolios to becoming true purveyors of altruistic advice. Advice that goes well beyond the balance sheet...advice that looks at helping clients define what matters most to them. In short, helping clients achieve well-being.
BILL COPPEL	Along this journey, we've had the opportunity to speak with some incredible guests in industries dealing with similar challenges, like medicine and our conversation with Dr. Bryan Vartabedian.
BILL COPPEL	From there, we talked to authors and academics, psychologists and industry leaders in search of insights that will help advisors improve their abilities and their relevance in helping clients define and achieve what matters most in life.
BILL COPPEL	Some of our more notable episodes featured: Renowned Harvard psychologist, Dr. Ellen Langer The head of the MIT AgeLab, Dr. Joe Coughlin Stanford life design expert, Bill Burnett Chip Conley, best-selling author, hospitality entrepreneur, strategic advisor to Airbnb, and Founder of the Modern Elder Academy And the list goes on, impressively.
BILL COPPEL	In the midst of this journey – certainly over the last 18 months – the global pandemic has accelerated the digital disruption that was already under way. At the same time, COVID accelerated the level of uncertainty in our lives, making the need for a new flavor of advice even more important.

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BILL COPPEL	<p>When I think about this 21st century advice, it centers on the notion of transition and pivot, which is one thing we all have in common as we travel through life. That's what makes it so interesting and exciting. Too often though, we allow life's transitions to sneak up on us unknowingly and without warning. However, I believe the signs are always there, we just have to be willing to see them.</p>
BILL COPPEL	<p>That said, I want to share with you that I am embarking on my own transition, one that appeared on the horizon and that I embraced.</p> <p>So, with that as a backdrop, we are bringing The Next Frontier podcast to a close, and this will be our final episode. It's been a privilege to share our perspectives and those of our guests. Our hope is that in some small way we've helped you discover new ways to enhance the lives of the clients your serve... This has been an extraordinary journey, and we couldn't have done it without you, our listeners.</p> <p>Thank you for "tuning in" and joining the conversation. And as I always say, until next time, be well.</p>
Outro	<p>If you want to join the conversation or connect with us, please visit us at www.firstclearing.com. This content is provided for general informational purposes only. The views expressed by non-affiliated guest speakers are their own and do not necessarily reflect the opinion of First Clearing or its affiliates. First Clearing and its affiliates do not endorse any guest speakers or their companies and, therefore, give no assurances as to the quality of their products and services. This channel is not monitored by First Clearing. First Clearing is a trade name used by Wells Fargo Clearing Services, LLC, Member SIPC, a registered broker-dealer and non-bank affiliate of Wells Fargo & Company. Copyright 2021. Wells Fargo Clearing Services, LLC. All rights reserved. First Clearing provides correspondent services to broker-dealers and registered investment advisors and does not provide services to the general public. CAR-0323-00790</p>