

Episode 0

Title

00: Welcome to The Next Frontier

Show Description

Disruption is all around us as technology impacts every aspect of our personal and professional lives. If you're a financial advisor, chances are you're feeling the effects of this disruption in the expectations of your clients. Join us as we explore The Next Frontier and examine the evolving role of the trusted advisor through the lens of experts and thought leaders from inside and outside the financial services industry. We believe the firms and advisors who will thrive in the future are those who are willing to engage in new conversations and seek different perspectives. Are you ready?

Show Notes

In a world of artificial intelligence and algorithms, what is the role of the financial advisor and how does it align with changing client expectations? In this new podcast, thought leaders and practitioners from financial services and other industries share their perspectives on navigating the digital paradigm shift and the skills advisors will need to thrive. Host Bill Coppel has been a financial advisor and held numerous leadership roles over his 30-year career in the financial services industry. If you're ready to engage in new conversations that will challenge you to think differently about the role of advice and guidance, we invite you to join us.

Disclosure:

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