FirstClearing

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From the Desk of Bill Coppel

As the year gets into full swing, I've been reflecting on the best way to move forward in a world of perpetual uncertainty and accelerating change.

Amid all the disruptions we're facing, one thing that grounds me are the words of my friend, Hal Gregersen - Executive Director of the MIT Leadership Center and co-author with Clay Christensen of *The Innovator's DNA*. Hal is known for saying "the answer often lies in the question," and as we strive to deliver what clients truly value, the challenge becomes putting this insight into practice.

So with that, what should we be asking ourselves today to move beyond what we traditionally viewed as our expertise to define what advice means for the

21st century? I hope this month's Digest helps you dig into that important question.

Be Well,
Bill

P.S. Look for *TNF Digest* in your e-mail inbox once a month. Forward to others you think would enjoy the content. Or, hit "unsubscribe" at the bottom of this message if you'd rather not hear from us.

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THINGS WE LIKE

10 Trends to Watch in 2021

2020 really tested our resilience. And for an industry that can be slow to evolve, the speed at which advisors embraced the "new normal" boosted our optimism. So what's coming in 2021? Here's an interesting article about 10 trends to watch in 2021. **Read the Full Article >**

2021 Outlook - Forging a Path Forward

Wells Fargo Investment Institute provides its forecasts for the economy and markets and highlights potential investment opportunities in 2021. **Read the Full Report >**

Well-Being: Visualizing Life's Journey

Where are our choices leading us in life? One of the ways to gain awareness about your life and the choices you make in your life is by reflecting on your values; that is, what matters most in your life? **Read the Full Article >**

THE NEXT FRONTIER PODCAST

Perspectives on the Evolving Advice Business

Brian Hamburger, head of MarketCounsel, joins John Peluso, President of First Clearing, for an insightful discussion around key trends unfolding in the wealth management space, why the move toward independence is accelerating and how we can challenge one another to think more creatively around adding value in the 21st century.

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The Five Biggest Retirement Dangers That Money Can't Fix

You help clients prepare for retirement financially, but have you considered they may also need help in discovering how to ready themselves for their "third-half of life"? Listen to our discussion with Andy Raub, a 35-year industry veteran, as we look at how to move from a money-only conversation into a life-based conversation.

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Design a Life of Meaning and Purpose

Society tells us our lives should follow a set path, yet we often need to pivot to move forward. Luckily, there are specific tools and mind-sets that can help us build meaningful futures. Listen while Bill Burnett, Executive Director of Stanford's Product Design Program, discusses how the principles of design thinking can help us figure out what's next.

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WEBCAST

How to Speak so that People Want to Listen

If you missed our latest webcast with 5-time TED Talk sound expert Julian Treasure - **How to Speak so that People Want to Listen -** you can catch it on-demand. Building on the secrets that more than 71 million people have viewed in his TED Talks, Julian demonstrates the how-tos of powerful speaking with a special focus on virtual communication.

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