



June 2021

From the Desk of Bill Coppel

In our rapidly changing world, repeating the past isn't likely to be the formula for success in the future. While we tend to fall back on traditional ways of doing business, we've seen companies that cling to 20th century leadership styles struggle to find a sustainable path forward.

With our industry in transition, we no longer have the luxury of approaching leadership "the way it's always been done." Given the disruption and uncertainty we're all experiencing, our role as financial advisors -- whether in managing our teams and businesses or guiding families to a meaningful tomorrow -- is more critical than ever before.

In this month's Digest, we're serving up new ways of thinking about the skills and mindsets that can position us to lead successfully as we navigate change in the evolving advice business.

Be Well,

Bill

P.S. Look for TNF Digest in your email inbox once a month. We hope you enjoy the content. Or, hit "unsubscribe" at the bottom of this message if you'd rather not hear from us.

William Coppel | Chief Client Growth Officer

First Clearing

1 North Jefferson Avenue, St. Louis, MO 63103



THINGS WE LIKE

Six Strategies for Leading Through Uncertainty

If there was ever any doubt about the importance of a leader's ability to navigate change, uncertainty, and disruption, the emergence of the global pandemic in 2020 made this necessity abundantly clear. [Read the Full Article >](#)

Are you Emotionally Ready to Retire? Eight Questions to Ask Yourself

It's one of the most important decisions many of us will ever make. And we often get it wrong. I'm talking about retirement — and specifically, when to do it. If you are lucky enough to be able to determine your own retirement date, be grateful that this change is not being forced upon you. But also be aware that it isn't a simple decision. [Read the Full Article >](#)



John Lawton: 21st Century Leadership for an Ever-Changing Landscape

The disruption and uncertainty we're experiencing today is cause for reflection on how we show up as leaders. In this episode, John Lawton - CEO and a financial advisor at BLB&B Advisors - joins host Bill Coppel - Managing Director and Chief Client Growth Officer at First Clearing - to explore how authenticity, empathy, and emotional intelligence can help us evolve as firm leaders and advisors. [Listen to the Podcast >](#)



Lolly Daskal: Rethinking Great Leadership – How to Avoid Falling into the Gaps

In the quest to become a great leader, most people want to know the how; they typically don't think much about the who. Lolly Daskal, a world-renowned executive leadership coach, believes that great leadership starts from within. In this episode, she and host Bill Coppel – Managing Director and Chief Client Growth Officer at First Clearing – discuss how we can fall into leadership gaps if we don't know who we are. [Listen to the Podcast >](#)



Bob Chapman: Truly Human Leadership

Amidst digital disruption in the financial services industry, Bob Chapman knows there will always be a need for caring. Bob has embraced an approach that he calls “truly human leadership” as CEO of Barry-Wehmiller, a \$2.5 billion global manufacturing business. In this episode, he and host Bill Coppel – Managing Director and Chief Client Growth Officer at First Clearing – discuss how caring for people and making them feel valued is the real differentiator in this industry and can profoundly affect the world. [Listen to the Podcast >](#)



WEBCAST



How Leaders Can Overcome Their Blind Spots: With Amy Edmondson

Amy C. Edmondson is the Novartis Professor of Leadership and Management at the Harvard Business School. [View the Webcast >](#)

The views expressed in this webcast are the author's own and do not necessarily reflect the opinion of First Clearing or its affiliates.

**FirstClearing**

First Clearing provides correspondent services to broker-dealers and registered investment advisors and does not provide services to the general public. This communication and the podcast(s), webcast(s), event(s), etc. listed within the communication are for broker-dealers and registered investment advisors only; not for use with or distribution to the general public.

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. (c) 2021 Wells Fargo Clearing Services, LLC. All rights reserved.
CAR 0521-02291.

CONFIDENTIALITY NOTICE: This transmission is intended only for the named recipient and may contain information that is privileged or confidential. If you are not the addressee, note that any disclosure, copying, distribution, or use of the contents of this message is prohibited. If you received this message in error, please destroy and notify the sender immediately.

[unsubscribe from this newsletter](#) [update subscription preferences](#)

First Clearing, 1 North Jefferson Ave., St. Louis, MO 63103