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From the Desk of Bill Coppel

Given the uncertainty we're experiencing in the world today, advice is more valuable than ever. While this presents an opportunity for financial advisors, it also brings questions about the way we approach the business.

What we do know is that how we've done things in the past isn't likely to define our success in the future. The business of advice is evolving, and clients today are concerned about much more than their money.

Ultimately, advice must be centered on helping clients achieve what matters most to them. In this month's Digest, you'll find new approaches to guiding clients on a path to well-being in a world overrun by constant change.

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

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THINGS WE LIKE

Health and Aging Planning in a Post-Pandemic World

Perhaps at no point in modern history has the connection between physical health and financial wellness been made so starkly clear. The outbreak of COVID-19 has financially affected virtually every person, every company, and every organization across the globe. [Read the Full Article >](#)

The New Landscape: Investing in Post-Pandemic Markets

COVID-19 has upended our daily lives, while the response to the pandemic has reshaped global markets and the economy. The pandemic accelerated certain market trends that were already underway prior to the outbreak -- while sparking new ones. [Read the Full Article >](#)



David Hohimer: Enhancing the Client Experience Through Authenticity

Today, what it means to serve clients extends beyond money management. Advisors' own life perspectives and lessons are now informing the way we approach the business. In this episode, David Hohimer - Founder and Managing Partner at Hohimer Wealth Management - joins host Bill Coppel - Managing Director and Chief Client Growth Officer at First Clearing - to explore how authenticity can enhance the value we create as advisors. [Listen to the Podcast >](#)



George Kinder: Golden Civilization Conversations

Our world's larger economic forces have us convinced that our life focus should be on jobs and profits, but what we want more than anything is freedom. Founder of the Kinder Institute of Life Planning, George Kinder joins host Bill Coppel - Managing Director and Chief Client Growth Officer at First Clearing - to discuss the benefits of shifting the advisor-client conversation from money to life vision. [Listen to the Podcast >](#)



Anita Shaughnessy: Weaving Well-Being Into the Fabric of Advice

From remote work to social isolation, COVID-19 has had a major impact on our well-being. In this episode, Anita Shaughnessy - Wells Fargo Vice President and Well-Being Benefits Manager - joins host Bill Coppel - Managing Director and Chief Client Growth Officer at First Clearing - to explore how the well-being of the families that advisors serve extends far beyond their finances. [Listen to the Podcast >](#)



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