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Navigating Life's Transitions and Pivots

Life is a series of transitions and pivots. And whether they're unexpected or planned, these times of uncertainty can disrupt our sense of well-being.

Fortunately, navigating life's transitions is a skill we can learn and master.

In this month's Digest, you'll find insights that can help you guide clients as they prepare to welcome meaningful change into their lives.



THINGS WE LIKE

10 Tips for Successfully Navigating Major Life Transitions

We are currently dealing with a global pandemic that has forced all of us into a time of transition to varying degrees. Some of us have had our lives changed immeasurably, while others have only had to make relatively minor adjustments to their daily lives. Transitions are hard, but we can learn how to react in ways that help us thrive. [Read the full article](#)

Three Tips for a Smooth Transition into Retirement

Executives often struggle with life after retirement, and enter this phase of their lives ill-prepared. Fortunately, there are ways to make the transition less painful. [Read the full article](#)



VIDEO

First Clearing Speaker Series: Understanding Sleep & Anxiety for Optimal Performance

Disrupted schedules, increased stress, and pressures at work and home can interfere with sleep in many ways. Learn practical tips and strategies to start getting sweet dreams during times of highest unrest.

[Visit our Speaker Series page](#)

Need a Fresh Start? How to Master a Life Transition

Bruce Feiler, the author of *Life is in the Transitions: Mastering Change at Any Age* offers powerful, detailed strategies to rebuild our lives in times of uncertainty and transform them into periods of growth and renewal. [View the Video](#)

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Robb Baldwin: What's Driving Custodial Decisions in the RIA Space Today

For independent advisors, the ability to help clients discover what really matters and then achieve it depends, in large part, on how well they are served by their custodians. In this episode, we explore what service means in a world dominated by fintech. [Listen to the episode](#)

Gerri Leder: Are We Truly Ready to Transition?

When it comes to retirement, we may be prepared financially, but are we emotionally ready for what's next? In this episode, we explore ways to think differently about retirement through self-reflection and curiosity. [Listen to the episode](#)

Sherri Snelling: Home Sweet Home – Navigating Where and How to Live Out Our Bonus Years

Buying a house is one of the most important investments we'll ever make. Yet we often forget to consider whether this home will serve us well during the later years of our lives. In this episode, we explore how advisors can help clients navigate through options for living as they age. [Listen to the episode](#)



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