



April 2021

From the Desk of Bill Coppel

When I was trained as a financial advisor decades ago, we were taught to provide clients with investment ideas and information. That made sense when our value was defined by how much we knew. Interestingly, many advisors today still cling to that approach.

But with the disruption and uncertainty we're experiencing in the world today, it's no longer enough to be technically proficient. We also need to demonstrate empathy and emotional intelligence, which we've traditionally thought of as "soft skills." In fact, I'd argue that these "soft skills" are actually the new "hard skills" we'll need to cultivate for continued success in the evolving advice business.

In this month's Digest, you'll find insights we hope will inspire you to consider the skills you bring to the table and how you might redefine the value you provide.

Be Well,
Bill

P.S. Look for *TNF Digest* in your e-mail 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.

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THINGS WE LIKE

Emotional Intelligence: Why We Need it Now More Than Ever

Navigating the pandemic's psychological, physical and economic effects is complicated and evokes a range of different - and often conflicting - emotions. Add social injustice and political unrest, and emotional intelligence is needed more than ever before. [Read the Full Article >](#)



Vaughan Scott: Enhancing Your Value Through Empathy and Emotional Intelligence

The business of advice has changed. And clients today are concerned about much more than their money. In this episode, Vaughan Scott, CEO of Axiom Financial Strategies Group, joins us to discuss how advisors can use empathy and emotional intelligence to deliver advice centered on helping clients achieve what matters most to them. [Listen to the Podcast >](#)



Dr. Tim Ursiny: Building Better Relationships with a New Kind of Coaching

In a period of rapid change, financial advisors must learn how to deal with stress and build resilience, for themselves and their clients. Host Bill Coppel -- Managing Director and Chief Client Growth Officer at First Clearing -- sits down with Dr. Tim Ursiny, Founder of Advantage Coaching & Training, and discusses how to use emotional intelligence to build powerful, trusted relationships with clients. [Listen to the Podcast >](#)



Steve Gresham: The Real-Life Challenges of Wealth Management

Financial advisors tend to view their clients in a frozen moment of time -- treating their needs as static. Industry veteran Steve Gresham believes the biggest challenge facing advisors is staying in touch with clients as their lives change. In this episode, he shares how advisors can be proactive in offering a better client experience. [Listen to the Podcast >](#)

OUT AND ABOUT



Advisor Choice: How Models Like Wells Fargo's First Clearing Offer Optionality and Flexibility

Multi-channel models have become one of the hottest options in recent years, giving advisors a path from employee to independence without ever changing firms. John Peluso joins Mindy Diamond on her podcast to talk about the benefits of the model and its impact on the industry at-large. [Listen to the Podcast >](#)



The Future of Wealth Management in One Word

When you think about the things shaking up wealth management, your thoughts might go straight to consolidations, new regulations or technology. In this short, energetic talk created for the SIFMA Small Firms CEO Roundtable last month, John Peluso, President of First Clearing, shares his take on the ONE thing primed to be a powerful shaper in our industry and how it could impact your business. [Watch the Video >](#)



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