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From the Desk of Bill Coppel

COVID-19 will likely reshape clients' sentiments and expectations for generations to come. But one thing is for sure: Uncertainty, and the reality of accelerating – almost minute to minute – change, is opening the door for meaningful advice and guidance that expands beyond what we traditionally associate with financial services.

While helping clients manage their financial resources is important, it's not the only area where advice can make a profound difference. There's a broader spectrum of issues clients are dealing with on a daily basis that can't necessarily be solved by rebalancing a portfolio.

So as a financial advisor, how do you go beyond the balance sheet to discover what matters most to clients and help them achieve it? In this month's

Digest, we're serving up insights that can broaden your perspective on what it means to deliver value 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

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THINGS WE LIKE

Beyond Finances: Holistic Life Planning Trends Among Advisors

As the profession continues to evolve, the title of financial advisor is due for a figurative rewrite. Increasingly, as advice becomes more holistic, life planner or life whisperer may be more apt. The changing nature of advice is particularly true today, as a pandemic has added to the breadth and depth of conversations advisors have with their clients. [Read the full article >](#)

How the Pandemic Has Changed Attitudes Toward Wealth

Americans found that money cannot buy everything, and they used their wealth to build relationships and help others, according to two recent surveys. [Read the full article >](#)



Season 3 Close: Separating Fact from Fiction

At the Next Frontier, we've learned a lot from our guests about how to navigate a world of perpetual uncertainty and accelerating change. Join host Bill Coppel, Managing Director and Chief Client Growth Officer at First Clearing, as he reflects on how the 24/7 flow of information – and misinformation –

affects our ability to transition and pivot through life. [Listen to the podcast >](#)



Seth Streeter: Redefining Success in a Culture of Productivity

In a world that places so much value on productivity and success, we often lose sight of what truly matters. What if our measure of success was something beyond the amount of wealth we accumulated? In this episode, Seth Streeter and host Bill Coppel – Managing Director and Chief Client Growth Officer at First Clearing– pose this question and explore what it means to redefine success and the ways it could change how we manage wealth. [Listen to the podcast >](#)



Conor Delaney: Trading Jaguars for Jogging

No matter your career, physical, spiritual, and emotional health is essential to success. Conor Delaney understands the importance of this, and as CEO of The Good Life companies, whose headquarters has a 4,000-sq-ft fitness institute, he has witnessed its transformative effects on his advisors' lives and relationships with their clients. In this episode, he and host Bill Coppel – Managing Director and Chief Client Growth Officer at First Clearing – discuss this holistic approach to financial advising. [Listen to the podcast >](#)



How to Grow and Thrive in an Evolving Business Landscape

In the ever-evolving business landscape, it is important to embrace change to grow and thrive. In this conversation, hosted by Entrepreneur.com, SurveyMonkey CEO Zander Lurie shares how he's embraced change over his 20-plus year career. [View the webinar >](#)

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