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From the Desk of Bill Coppel

The fastest growing age group in the U.S. is people 65 and older, a trend that shows no signs of slowing as medical advances help us live longer, and in many cases, healthier lives.

While living longer brings opportunities, it also raises questions. As clients approach what's been traditionally viewed as retirement age, for example, how do they continue to feel relevant and live meaningful lives that can extend – in some cases – almost as long as their careers?

As financial advisors, we should be at the center of issues like these ... going beyond the balance sheet to help clients prepare mentally and emotionally for, what I like to call, “the third

half of life.” Read on for more on this important topic.

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

It's Time to Rethink Aging and Retirement

People are embracing age as a period of continued growth. Instead of just seeing dependent retirees, we're beginning to see a new type of experienced, accomplished workforce. Instead of seeing expensive costs, we're witnessing an exploding consumer market that is bolstering our economy. Instead of seeing a growing pool of dependents, we're seeing the growth of intergenerational communities with new and different strengths. [Read the full article >](#)

Making the Transition from Financial Planning to Longevity Planning

To best address the concerns of aging baby boomers, we have to change from being asset managers to lifestyle managers. We need to

become familiar with different providers of various services and take a much more holistic approach to working with our clients and meeting all the needs they have. And we have to learn how to work with multiple generations to make the transition in wealth from one generation to the next. [Read the full article >](#)



Sherri Snelling: What Advisors Should Know About the Cycle of Grief

We often think about grief in the context of losing a loved one, but it can actually occur any time we experience changes like losing a job, health problems, or a move. In this episode, Sherri Snelling, founder & CEO of Caregiving Club, joins host Bill Coppel — Managing Director & Chief Client Growth Officer at First Clearing — to explore why financial advisors should understand the grief cycle and what it takes to get beyond it. [Listen to the podcast >](#)



Marc Freedman: Finding a New Life Currency as We Age

The need for a meaningful and purposeful life transcends age. In fact, you might say it's even more important as we grow older. In this episode, Marc Freedman — President, CEO, and Founder of Encore.org — joins host Bill Coppel – Managing Director and Chief Client Growth Officer at First Clearing — to explore ways advisors can help clients prepare for what could be the most exciting stage of their lives. [Listen to the podcast >](#)



Dr. Joseph Coughlin: Making the Most of Our Bonus Years

Technology has fundamentally changed our lives, helping clients live longer, better and more fully. Dr. Joseph Coughlin, a leading authority on the longevity economy, and host Bill Coppel — Managing Director

and Chief Client Growth Officer at First Clearing — discuss the opportunities this presents for advisors and how beginning to think like a client can give advisors a competitive advantage. [Listen to the podcast >](#)



VIDEO



From Success to Significance: A Legacy of Purpose for Longer Lives

Longer life means more time for family, friends and leisure, but the opportunities to make a difference in the world are bigger than that. For those fortunate to have the talent, perspective and the commitment to seize the day and act, longer life means the possibility to reinvent and reimagine life, find new purpose and engage and contribute in fresh ways. [View the video >](#) *(For best results, consider using a Chrome web browser)*

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