Podcast Transcript
Synergize: Unscripted Conversations to Help Guide Advisor Growth
Episode 9 – Welcome to Synergize: Season 2 Preview

INTRO:
Welcome to Synergize unscripted conversations, where we explore the evolving role of the financial advisor in an emerging AI-driven world. Join us as we bring together thought leaders across a range of disciplines and industry experts, sharing insights designed to help RIAs thrive in the industry of tomorrow.

BILL COPPEL:
Hi, this is Bill Coppel, Chief Client Growth Officer, at TradePMR. And I want to welcome you to Synergize: Unscripted Conversations to Help Guide Advisor Growth. I'm here with my colleague Ryan Neal, Senior Editor at TradePMR, to kick off season two of the podcast. I'm excited to have Ryan join me as co-host as he did a wonderful job for us recently standing in for me out in Las Vegas.

Most importantly, Ryan brings to the table a solid background in journalism, which I believe will add tremendous value to these conversations. So, Ryan, tell us a little bit about yourself.

RYAN NEAL:
Hi, Bill. thanks for having me. I'm excited to now be a full co-host of the podcast. As Bill said, I'm a former journalist. I started reporting in 2009 for a local paper out in California. I've written everything from, local politics stories to sports, technology and some arts and entertainment stuff.

I came to the wealth management space about nine years ago. My first job was with wealthmanagement.com, which back then was Registered Rep, which I know will be familiar to a lot of our listeners. From there I went to Investment News, then to Financial Planning, then back to Investment News before freelancing for a little while for Think Advisor and InsuranceNewsNet.

I joined TradePMR in December to really boost the company's content and launch new content initiatives for the firm, including, working on this podcast with you, Bill. So, excited about it.

BILL COPPEL:
We're really proud to have you with us. Ryan.

RYAN NEAL:
So, Bill, in season one, our listeners heard from folks who we consider to be some of the best thought leaders in the RIA space, as well as some folks from other disciplines that shared great information for RIAs with a specific focus on growth, organic growth,

building enterprise value. So, what can you tell us about what we have in store for season two?

BILL COPPEL:
Well Ryan, we are going to continue to lean into that theme and bring more subject-matter experts and thought leaders with different points of view on what it takes to drive growth. We’ll explore topics like hiring and succession planning trends, and we’ll look at where technology begins to intersect with marketing. We’ll also take a look at some common misconceptions about RIA growth.

RYAN NEAL:
Well, I know there's a lot of those out there, especially around some of the new technologies like AI. So, I'm looking forward to diving into that with you, Bill.

RYAN NEAL:
So, our commitment in Synergize is to make each episode worth your while to listen. Watch out for our next episode where we'll bring you more insights and actionable ideas to help you grow your business.

BILL COPPEL:
And remember, the challenge is yours to capitalize on what the future offers.

OUTRO:
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