



Our Most Listened to Podcasts of 2019

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by Advisor Perspectives

This year marked the introduction of our Gaining Perspective podcast. Here are the 10 most listened to episodes of 2019, starting with the most popular podcast of the year:

1. How to Tell in Three Minutes if Someone is a Successful Advisor

Featuring: Dan Solin

Dan Solin has worked with thousands of advisors in his role as a coach, consultant and public speaker. He has written that when he meets an advisor, he can tell within the first few minutes whether he or she is or will be successful. What is amazing is that he says it's not difficult. He looks for only one trait.

2. Gary Shilling - "We are already in a recession"

Featuring: Gary Shilling

The U.S. economy is likely already in a recession, according to Gary Shilling. To address it, look for further rate cuts from the Fed and a fiscal policy focused on infrastructure spending.

3. An Economist Walks Into a Brothel - Lessons for Financial Advisors

Featuring: Allison Schragger

Several years ago, Allison Schragger walked into the Moonlite BunnyRanch, a legal brothel in Nevada. She was there to study economics – specifically how the owners and sex workers dealt with and reduced the risks of their professions. Allison discusses the lessons from that experience, as well as a number of other professions she has studied - including the recent Jeopardy champion, James Holtzhauer.

4. Two Opposing Views: Will the CFP Board Survive the WSJ Expose?

Featuring: Bob Veres and JR Robinson

On July 30, on its front page, the Wall Street Journal reported that it had compared 72,000 profiles from the CFP Board's "Let's Make a Plan" website against FINRA broker-check complaints, including criminal and regulatory problems, and found that approximately 6,300 CFP profiles omitted those complaints. Most disturbingly, there were 140 CFPs who faced or currently face felony charges. We speak with two experts who have very different views on whether the CFP Board can still serve the advisory profession and, if not, what its future should be.

5. Strategies for the Challenges of Longevity – Maximizing Your Social Security Benefits

Featuring: Carlo Cordasco, Vice President of the Nationwide Retirement Institute

There are many retirement risks, such as: stock market performance, inflation, a volatile regulatory environment, the deterioration of good health, withdrawal timing and the need for long-term care. All have the potential to wreak havoc on retirement savings, but one risk could be more significant than the rest, Longevity.

6. How To Build a Great Practice and Take 100 Days Off Per Year

Featuring: Stephanie Bogan

What holds advisors back from building the business they ideally want is not their environment or skill set. It is the "mindset." Stephanie Bogan explains how advisors can overcome the obstacles that prevent them from building a thriving practice and leading a joyful and fulfilling personal life.

7. Why Are Clients So Bad with Probabilities - and Worse with Consequences?

Featuring: Allan Roth

Recently, a client came to Allan Roth with a net worth well over \$10 million. He had enough money to support his family's desired lifestyle for the rest of their lives, but not so much that he could withstand a large loss without cutting back substantially. Yet this client-owned more than 130% in risky assets, meaning he had far more debt than fixed income. Much of the debt was in a variable rate margin loan against his brokerage account. Listen to Allan discuss what happened to this client.

8. How to Choose the Right Medicare Plan When Turning 65

Featuring: Danielle Roberts of Boomer Benefits

One of the most consequential decisions in every one of our lives is enrolling in Medicare. We will make fateful decisions that will affect our healthcare for the rest of our lives. Danielle Roberts, an expert on Medicare enrolment, examines the choices we must make.

9. How to Begin a Great Client Relationship

Featuring: Dick Vodra

Is there a plan? Is it still working? How are we doing, and are we going to be okay? What are we missing, either as opportunity or risk? What's most urgent? When starting a client relationship, how can you and your clients agree on which of these questions (translated to their life circumstances) you can help them with, and whether you are the right person for them?

10. Did You Make a Good Decision - Or Were You Just Lucky?

Featuring: Larry Swedroe

How can advisors distinguish between a good outcome that is the result of a poor decision versus one that results from a good decision?