



EPISODE TRANSCRIPT

Industry Update: A Powerful Strategy to Accelerate Growth for Financial Advisors

A Conversation with Louis Diamond

Mindy Diamond:

Welcome to the latest episode of our podcast series for financial advisors. Today's episode is an Industry Update on A Powerful Strategy to Accelerate Growth for Financial Advisors— A conversation with my partner, Louis Diamond. I'm Mindy Diamond and this is Mindy Diamond on Independence.

Mindy Diamond:

This podcast is available on our website, diamond-consultants.com, as well as Apple Podcasts and other major podcast platforms. If you are not already a subscriber and want to be notified of new show releases, please subscribe right on your favorite podcast platform or on the episode page on our website. For Apple Podcast users, I'd be grateful if you'd give the show a review, your input helps us to make the series better and alerts other advisors like you who may find the content to be relevant. And while you're at it, if you know others who are considering change or are simply looking to learn more about the industry landscape, please feel free to share this episode or the series widely.

Mindy Diamond:

Nearly two decades ago, I discovered a phenomenon by accident and had no idea how very impactful it could be. That is the power of implementing a content marketing strategy. And the good news is that is a strategy that advisors can easily adapt and employ to reach their constituents and grow their businesses. For me, it started by contributing content to industry media. That put me and Diamond Consultants on the map and paved the way for what was to follow, the evolution of a content marketing machine that has been the most powerful and impactful growth engine for our business. And it's driving not only revenue, but credibility, name recognition, and brand awareness.

Mindy Diamond:

The first article I submitted was to what was then a magazine called Registered Rep and as the industry evolved, so did the content. One article a month turned into a weekly endeavor for me and ultimately, for Louis and the team at Diamond Consultants. Each became contributors to our own article, library or blog as we initially called it, which was distributed via our website and to a subscriber list. That then morphed into a weekly podcast series that has exponentially grown over the past three years and a robust social media presence that has become a regular part of our day's work.

Mindy Diamond:

Today, I still write that very same monthly column, but Registered Rep magazine is now both a print and online media publication rebranded as Wealth Management. They also graciously publish additional articles by me, Louis and the team, as well as syndicate this podcast series. It's become quite a marketing ecosystem, growth driven more by the motivation and passion to share than to grow our brand and Excel our reach. And let me be clear: I don't have a marketing background—and I'm sure that



EPISODE TRANSCRIPT

Industry Update: A Powerful Strategy to Accelerate Growth for Financial Advisors

A Conversation with Louis Diamond

many of you who are listening don't either. I was an accounting major and worked two accounting jobs before becoming a recruiter. Like how I started Diamond Consultants, I happened upon this burgeoning marketing ecosystem somewhat accidentally. I turned a passion project into an incredible growth initiative. This powerful ecosystem we created is built upon a chassis called content marketing.

Mindy Diamond:

So what exactly is content marketing? It's about taking your unique insights, perspective and knowledge and turning it into various sizes and forms of communication for distribution that are scalable and repeatable—allowing you to speak to people on their time and their preferred platform. The result, when done strategically and thoughtfully can provide long-lasting value. For example:

Mindy Diamond:

It identifies you as a thought leader. It tells the world you are smart and that you “get it.” It demonstrates consistency and staying power. It drives credibility and brand awareness. It's the biggest differentiator I know. When everyone else is smiling and dialing and trying to get past the gatekeepers, you are sailing right past them. And it's an opportunity to create an advantage by showing prospects how you think and work—and ultimately exactly the type of consultant you would be to them.

Mindy Diamond:

I've learned so much in this journey as to why content marketing is so powerful—and want to share how it happened with you because I think there's a lot to learn for anyone building a business either as an employee or independent. Consider this: Before I started writing my registered Rep CareerMoves column, I was making at least 50 outbound calls—and connecting with maybe 2-3 humans per day. That translated to about 10-15 meaningful conversations per week and 80-90 per month. Many of them were really good interactions and I was successfully building Diamond Consultants one conversation at a time.

Mindy Diamond:

Fast forward to today, I still make plenty of outbound calls but I also communicate with thousands of advisors every day, every week, every month via my article on WealthManagement.com, my podcast, articles on other media sites, my email newsletter, text messages and my social media posts.

That means that I am exponentially multiplying the number of people I am impacting throughout the year and that has translated into very meaningful growth for our business, deepened connections and allowed many more advisors to get to know me as a person. And for advisors, it means reaching that



EPISODE TRANSCRIPT

Industry Update: A Powerful Strategy to Accelerate Growth for Financial Advisors

A Conversation with Louis Diamond

many more clients and expanding their reach to prospects. Plus the Internet has made the process even more extraordinary: Because the content's lifecycle continues well beyond the initial publication, accessible via social media sharing, search engine results, text post links, and email. But there's a catch: Content marketing must be rooted in authenticity and of the highest quality.

Mindy Diamond:

For me, it was based upon my love of writing, my creativity, my authentic desire to gratuitously educate—without agenda or expectation. Simply put, I love doing it all. And, I believe that comes through in everything I write, say and post. It has to feel soulful to do it all. It has to be a true labor of love, because it is a lot of work! The business you get from it and the growth you experience should be the cherry on top—not the sole reason you are doing it. I've asked Louis to join the show so we can share some ideas on what works and why.

Louis Diamond:

Thank You so much for having me again. And I'm excited to hear your own perspective and really flipping the script. I get to interview you for a change and hear how you really helped build our business from the ground up.

Mindy Diamond:

Well, that would be my pleasure.

Louis Diamond:

Perfect. So that's my turn many say that content is king, and I think we really proven that, but I think even from my own perspective, the key is rooted in quality and relevance and authenticity, as you mentioned. So can you share some tips with the listeners on how to produce quality content?

Mindy Diamond:

Yeah. Well, first of all, it's got to feel soulful. So to begin to create content for content's sake is disingenuous and people know that. It's got to be rooted in a desire to really have something important to say, and to do it without an expectation or agenda.

Mindy Diamond:

So I guess the first thing I would say is don't let overwhelm stop you. Even if you don't think you're a great writer, it doesn't matter. There's a lot of ways or people that you can outsource the job of writing to. Although I don't, I will tell you I write everything myself, but the bottom line is if you've got something smart to say, there are certainly many people that can help you to say it. The other thing I would say is that consistency and quality matters more than anything. And to know that a lot of times,



EPISODE TRANSCRIPT

Industry Update: A Powerful Strategy to Accelerate Growth for Financial Advisors

A Conversation with Louis Diamond

what you put out there can feel like a black hole. When I first started writing it didn't move the needle at all. One article, five articles, 10 articles, probably nothing. But I remember about six months after posting my first article with what was Registered Rep magazine and speaking to an advisor who told me that he had read it and how my comments resonated with him. And that's when I began to realize I might in fact be on to something.

Louis Diamond:

Yeah. And I think too, I know what we've seen is many of the industry publications are really hungry for content. Even if you're not the one breaking news, you'd be surprised that the amount of content and the pressure that publications have in getting new and fresh stuff out. So I would say aim for the middle or even aim low to start get your first piece published, start somewhere. And don't be holding out for the Wall Street Journal or the Financial Times to publish your first article. I think you'd be surprised what they would take.

Mindy Diamond:

Well, that's actually a great point. We are all snobs, or at least I am, and I would love to be a guest writer for a piece in Wall Street Journal. That still hasn't happened to me yet. Though, the articles that I've written for publications, like what was Registered Rep and now Wealth Management and Advisor Hub and Investment News and On Wall Street Magazine, which are industry trade publications and well-read industry trade publications, put me on the map. And even if it wasn't the Wall Street Journal or Barron's, they were publications that advisors were reading that I was able to share. And as soon as something is in writing, it automatically elevates you. I could say the same thing by phone to five different advisors. As soon as I put it in writing, they paid attention more.

Louis Diamond:

Yeah, I agree. So where are you getting the ideas from? I mean, we've been publishing articles for close to 20 years at this point, and we need to come up with fresh stuff seemingly every day. So where do you initially get the ideas from and today, where are you finding your content?

Mindy Diamond:

Yeah, so it's a great question. When I first started doing it and what was Registered Rep Magazine asked me to be a monthly columnist, I thought, "How am I ever going to come up with a column a month?" And now I write an article a week, plus I write a monthly column for Forbes, plus I have content for the podcast. So I'm creating content and social media posts every single day. I am never at a loss for content because here's what I would say to you. As soon as you put it on your radar, you remind yourself every day that you're looking for content, you begin to realize that every interaction you have with a client, every interaction I have with an advisor, provides fodder. If one advisor I'm on the phone with is wondering about X, chances are so are a hundred other advisors, and that provides content. I'd say the



EPISODE TRANSCRIPT

Industry Update: A Powerful Strategy to Accelerate Growth for Financial Advisors

A Conversation with Louis Diamond

same to you. If you're talking to a prospect or a client, and they have a question about a topic, if they're wondering about it, chances are so as everybody else. And that's where the content comes from.

Louis Diamond:

Yeah, absolutely. and you also always start with the very clear and concise thesis, I think. And that is your building block for developing the idea further.

Mindy Diamond:

Well, that's actually a really good point because at first, when I first started writing, my instinct was I had a lot to say and I wanted to cover a lot in one piece, but an article is only meant to be around a thousand words, let's say. And so, what it really requires is a very narrow thesis. So I start, and my advice to everyone, is to start with a narrow thesis and write about that. The clearer you are about the thesis or the more focused the thesis, the better the piece will be. And the easier it will be in writing it.

Louis Diamond:

Let's pivot to social media. Obviously, that is the major trend these days. And it's become much more popular within the wealth management world as well. During the pandemic, we saw an acceleration of it. And now we're even seeing major firms like Merrill encouraging advisors to opt for social media over cold calling. So can you share some thoughts on social media in general and best practices for leveraging it?

Mindy Diamond:

Yeah. Well, the first thing I would say is that social media for the longest time felt like the biggest black hole of all. One, because we were on it long before many advisors were on it, I'm going back 10 years ago before the big firms allowed advisors to even have a LinkedIn account. So we were posting things and it felt like no one was seeing it, but obviously in the last number of years, everyone is on social media. So while I may not get direct commentary or direct response from an advisor for a post that I write, people are seeing it and it amplifies my voice, it multiplies the number of people that see it.

Mindy Diamond:

The other thing I would say to you is, is that one of the most powerful forms of written communication I do is, and you may notice it if you follow me, anybody listening to this, is I write at least one text post a day. They do incredibly well. What they are is essentially bite size content, much easier to write than a long form article that shares a thought. And I read something recently that Kevin Nichols, an employee of the leading industry coaching from the Oxley Group wrote.

Mindy Diamond:



EPISODE TRANSCRIPT

Industry Update: A Powerful Strategy to Accelerate Growth for Financial Advisors

A Conversation with Louis Diamond

The article was entitled 20 Post Ideas for Financial Advisors. And he talked about how there was an enormous opportunity for financial advisors to post on LinkedIn. He says that LinkedIn has over 310 million monthly active users and only three million of them share content on a weekly basis. Therein lies the enormous opportunity to talk to your audience, to fill a vacuum if you will. The more likes and views you get, the more the LinkedIn algorithm will serve your content to your audience.

Mindy Diamond:

So first and foremost, you make growing your audience a priority. Secondly, you post as often as you can as long as you've got something smart to say. Those texts posts or bite-sized bits of content are the best way, it's the easiest way to get your message out. And in that article that I'm referencing, he talked a lot about some great queries or prompts that you can use for text posts. Things as simple as what is the number one question you get asked by prospects? How has your approach changed since you started as a financial advisor, how do one of your hobbies or interests relate to what you do? What should your ideal prospect be asking you but isn't asking you? And et cetera, et cetera. Anything can be a text post. It can also, obviously, be about market commentary if you work for a firm that allows you to do it. And the one point that I'll make is that the more independent you are, the freer you are to express yourself without compliance oversight.

Louis Diamond:

Yeah, that is definitely the key and not everyone is even aware of the power of social media because they're in an environment where they're pre-programmed to not have their own unique or authentic voice. So it is one of the motivators many of our advisor clients have for going independent or even becoming more independent. Because a lot of this methodology, it might sound great to you, but unless you have compliance approval to do it, and it's not going to really going to make that much of a difference for you.

Mindy Diamond:

Well, so then let me ask you a question. So how does an advisor who isn't independent, who's an employee with any brokerage firm, how does he either leverage content marketing or how does he or she differentiate themselves?

Louis Diamond:

That's a great question. So it is a little bit more of a challenge depending upon the type of firm you're at, but even seeing advisors that we're connected with for many of the major firms, advisors still are able to have somewhat unique images on their website and kind of create their own messaging. You are usually restricted to the type of content you can post, but you are able to put your own, sometimes unique, spin on it and share some personal items.



EPISODE TRANSCRIPT

Industry Update: A Powerful Strategy to Accelerate Growth for Financial Advisors

A Conversation with Louis Diamond

Louis Diamond:

And not every firm is created equal. We see some of the regional firms like a Raymond James, or an RBC, or an LPL for instance, in any of their channels, be much more open and really liberating for advisors on what they can share. They'll still have to follow compliance guidelines, and they're not going to have as much freedom as someone who's truly independent, but there are ways to get a little bit more freedom and flexibility on the marketing spectrum.

Mindy Diamond:

Yeah. I agree with that totally. And what I was about to say is that professional posts, well-written posts are really an opportunity to shine and differentiate oneself, to strut your stuff to the world. I call it gratuitous education. I have no agenda or expectation. What I write, I'm not writing so that I'm hoping to make a sale or hoping to convince somebody to make a move. I'm writing because I like writing. I'm writing because I feel like I've got a unique vantage point and a unique point of view and I gratuitously want to share it.

Mindy Diamond:

If I get zero likes and zero shares and zero notice, I still feel good that I put it out there because it's always credible and honest. And I think the way I look at it is I hope that the readers or the listeners of our content recognize that. That I'm the kind of person or we are the kind of people they will want to do business with when the time is right, not just because we're smart and we're putting out fresh content, but because we are objective and gratuitous and have no agenda or expectation. We're not in it just for the transaction.

Louis Diamond:

Yeah, I agree. And I think we have different views on when to layer in more personal items, like family photos or posts about vacations. To me, I prefer to keep LinkedIn more professional and use Instagram and Facebook and other mediums for more personal stuff. I don't like to really blur the lines, but I know for you, and they've actually been some of your highest performing posts, you post pictures of our family trips or about random thoughts in your life. So I think the key is being authentic. To me, that wouldn't feel authentic. To you, it is. And I think everyone has a different kind of formula or approach for social media and you just got to find yours.

Mindy Diamond:

Yeah, I think that's a really good point. So I just had said to you offline that yesterday, I wrote a post about your six year anniversary with Diamond Consultants. And I wrote it from the perspective how proud I felt, not only as your mom, but as your partner. And it was a thoughtful, prideful post about the business and about our family and with it was a picture of you and I standing together in my office, taken long before the pandemic.



EPISODE TRANSCRIPT

Industry Update: A Powerful Strategy to Accelerate Growth for Financial Advisors

A Conversation with Louis Diamond

Mindy Diamond:

And it got about 6,000 views and I lost track of how many likes or whatnot. I wrote that post because it felt soulful and good. I didn't write it to pander for likes or views, but the more authentic I am, people do business with people. So while yes, they may turn to me for my perspective on what they're afraid of or what they worry about or what to consider when making a move. But they also want to know that I'm a human being, that I'm a good quality person and that's where LinkedIn or social media can really move the needle to allow people to get to know you in a way they couldn't any other way.

Louis Diamond:

Yeah, definitely. So there seems to be many ways to get your message out there. Can you talk a bit about leveraging the different platforms?

Mindy Diamond:

Yeah, well, we sort of discovered it piecemeal, kind of one thing at a time. It started with the column that we submitted to Wealth Management magazine. And let me make a comment about that. 15 years ago, on a whim, I approached at first On Wall Street Magazine and said, "Every advisor I talk to, wants to understand what kind of deals are out there," that was the hot question of the day. What are the deals being paid to advisors if they make a move? "I'd like to write an article about that." And On Wall Street Magazine, the editor at the time, turned me down. He said, "We don't want to play favorites amongst recruiters. We have other recruiters who would like to submit content. So the answer is no." I said, okay.

Mindy Diamond:

Rather dejectedly, I turned then to Register Rep magazine the editor in chief at the time. And he said, "Sure, why not?" He looked at it as free content. And he figured he'd give me a shot. If it wasn't good quality, he didn't have to write it. It turned out that piece did really well because I was right. People wanted to understand what kind of deals there were. That turned into a monthly column. So the first thing is, is to really recognize that you have a point of view and that unique point of view or vantage point provides content. That one, as you said, Louis, the media, the press is hungry for it because they're always hungry for smart content, but that your listening audience or your prospective audience might also be hungry for as well.

Mindy Diamond:

So it started out with a monthly column. Say, almost three years ago, almost to the day, I had been on the phone with an advisor and probably my fifth of the day, who had asked me about why so many people were going independent. What did it mean? And what were the economics and why would somebody turn down a big check from a wirehouse in order to go independent? So an hour into the conversation he said to me, "This is really good stuff. You should do a podcast. I'm a podcast listener. And I love to listen to stuff like this when I'm jogging or when I'm on my way home or whatnot."



EPISODE TRANSCRIPT

Industry Update: A Powerful Strategy to Accelerate Growth for Financial Advisors

A Conversation with Louis Diamond

Mindy Diamond:

And literally, on a whim, I turned to our director of marketing and said, "We should do a podcast." We figured out how to do it. I don't think myself, I had ever listened to a podcast and I want to reiterate, I don't have a marketing background. I'm not some creative marketing genius. We figured it out. We hired a social media consultant that taught us when the best time is to post and about the concept of different kinds of posts and how well videos and varying posts do and whatnot. So my point is we figured it out and we learned our way into it.

Mindy Diamond:

What you have to do is just figure out, "I like to write." That's what I figured out. I really liked to write. And so that's where I started because I was good at it because I had a competence because it didn't feel like it was a punishment. And actually, I'll ask you that Louis. You would much prefer to sit and have a conversation like this with me on podcast, I think, than you would to write though you have a lot of really smart ideas. So how do you manage through that?

Louis Diamond:

Yeah, I would agree with you. I'm not the writer type. I would much prefer to be working in the business and just doing. And sometimes writing, it slows me down and it's not my unique ability like it is for you. But what I did find was that coming up with ideas wasn't that hard. So now if I get an idea, I'll bring it to you or I'll bring it to our marketing team and have them really run with it. It needs to have my kind of direction because I'm the one who knows the content. But to your point earlier, you don't have to do it all yourself. You figure out what you're best at and then either hire or outsource, or figure out a way to leverage it.

Louis Diamond:

To me, I would prefer to sit here and have a conversation. So I'm better just talking rather than planning out and writing. So I think, again, it's just coming back to what you're best at and also what excites you. I mean, there is some of it that is a leap of faith and it's not always going to be fun. And it's always going to be more exciting to go out and win a client or help a client solve a financial issue. But if you look at it as a way to authentically grow your business, you're making an investment in the future, then I think it's all worth it. And that's the perspective that I normally take.

Mindy Diamond:

So let me ask you, where do you get your content from?

Louis Diamond:



EPISODE TRANSCRIPT

Industry Update: A Powerful Strategy to Accelerate Growth for Financial Advisors

A Conversation with Louis Diamond

I would say similar to you. It's I'm on the phone or on a Zoom or after a meeting with an advisor that tends to be the basis of it. But also, if we're working with a team of advisors and we just moved them to a new firm, sometimes we'll look at the learnings from that deal or from that interaction and think about how it can be applied to others. Or it might just be a summary or a catch-all of different concepts I've heard. So it's usually just from talking with advisors and just going about my day job. It's not rocket science.

Mindy Diamond:

Yeah. And let me be clear in case anyone is wondering, we will never ever share anything that somebody has shared with us confidentially. So when we write something it's much more about sharing a concept, but never identifying in any way, shape, or form the place where it came.

Mindy Diamond:

Louis, let me ask you another question. We agree that our content marketing was rooted in a desire to share and to educate and has become a real labor of love. And the fact that it's grown our business is the cherry on top. But you pay much more attention to the numbers these days than I do. How is it growing our business? What has been the net effect of our content marketing?

Louis Diamond:

Yeah, so it's been nothing short of extraordinary. Each time we add a new medium, it goes to expand the audience and expand the reach. My guess is approximately four out of 10 advisors we work with are coming from our marketing efforts. So either through a Google search or through SEO, through this podcast series, through an article. Honestly, it doesn't really matter which way someone found us. It's all part of the overall process. So, that number keeps creeping up. So our goal is to get it, let's make it eight out of 10 advisors are coming through marketing channels.

Louis Diamond:

Even though we still use cold calling and networking and all the other techniques to bring in business, marketing is scalable and it gets our word out and it helps us reach a part of the population that is really difficult to reach just through the phone or through other means. Advisors have, and just like your clients have gatekeepers, they consume information differently. Some aren't even in the office. So when we're able to get our podcast out at very low cost to an audience and reach an advisor that's never been on our radar at a small bank in Tulsa, Oklahoma, who cited the podcast, real story, and reached out and now is a prospect of ours. That's pretty powerful. So I look at it, it's been the growth engine of the business. And I think this is just the beginning.

Mindy Diamond:



EPISODE TRANSCRIPT

Industry Update: A Powerful Strategy to Accelerate Growth for Financial Advisors

A Conversation with Louis Diamond

Yeah. I agree with you. Totally. The other thing is look, I, from my bedroom floor, as most people know, built Diamond Consultants starting almost 25 years ago. And in those days, there was no social media. I wasn't writing a column. There was no way. And who was I? I had no thought leadership. So I built the business by smiling and dialing. One of my favorite things to do is to engage in a conversation with an advisor and have a face-to-face or a phone-to-phone in-depth conversation and answer their questions and broaden their perspective and share mine. So it doesn't replace that, but even for advisors that we've had 10 and 15 year relationships with, it absolutely goes to deepen that relationship because instead of hearing from me once a year or twice a year, they are reading my perspective often. And it just makes me more memorable, it adds credibility. And so, it's not just about new prospects, but it's also about really deepening relationships with existing ones.

Louis Diamond:

Exactly right.

Mindy Diamond:

So, what would you say, Louis, to an advisor that's at a brokerage firm, is limited because of compliance by what he or she is able to put out there, how he or she is able to differentiate themselves, how they're able to brand, et cetera, and they have something they want to say, what are they doing about it?

Louis Diamond:

Yeah. So it really matters how important is it for you to have that freedom and flexibility. If it's really important and you see a lot of promise in growing your business using this sort of methodology, then maybe it makes sense to consider going some version of independent. I would also encourage you to check out the social media posts, the websites, and just the overall marketing footprint that some of your competition and some of your friends and some of your peers have. It's really cool to imagine someone you sat next to for 20 years, you see them go independent and you just take a look at their websites, see the videos they're putting out, see what they're doing. Not everyone does this, which is also what makes it an opportunity is you'd be surprised, you think everyone has an opportunity, or most people, to get out there and market themselves and do content marketing, but most don't. So I would say, look at some people you admire and see what they're doing and see if that excites you. Maybe that'll give you an idea of what your ideal marketing platform could be.

Mindy Diamond:

So is there an example you could share with us of an advisor that you saw go from an employee of a wirehouse or brokerage firm to independent and how they used content marketing or marketing in general branding to really differentiate themselves and up their game?

Louis Diamond:



EPISODE TRANSCRIPT

Industry Update: A Powerful Strategy to Accelerate Growth for Financial Advisors

A Conversation with Louis Diamond

Absolutely. Yeah. There's many that come to mind, but I would say one that I noticed that I think has gone above and beyond in getting out as unique voice is he's actually a prior guest of ours on the podcast, Joe Eshelman of TowerPoint Wealth out in Sacramento. He puts out a ton of really smart, and sometimes funny, social media posts. During the pandemic, I saw him put out videos, he put out market commentary. I've seen him be a regular in certain local trade publications. I see them commenting in a very authentic way on people's posts. He's someone that immediately comes to mind. And he's not reinventing the wheel, he's just being himself. And there's many others and if anyone's interested, feel free to reach out. And I can point you toward a couple of other live examples.

Mindy Diamond:

Louis, this was really great. You know, it's funny, we've been doing this for a while now and it was rooted in something fun. It just was, "Hey, let's try that." And here we are, we've come a long way. It's fun to take a victory lap and look at what we've built and realize that it's something that we can share with others and hope it will help others to grow their business. So I'd say more to come on the topic and I thank you for joining me.

Mindy Diamond:

I'm amazed that people care what I think it takes courage to put yourself out there. The more authentic you are, the more vulnerable you are, the more you speak your own truth and it differs from the masses, the scarier it is. But what I've come to learn is that the more authentic and real I am, the more people respond to it.

Mindy Diamond:

I thank you for listening and I encourage you to visit our website Diamond-Consultants.com and click on the tools and resources link for valuable content. You'll also find a link to subscribe for regular updates to the series. And if you're not a recipient of our weekly email perspectives for advisors, click on the articles link to browse recent topics. These written pieces are an ideal way to stay informed about what's going on in the wealth management space without expanding the energy that full-on exploration requires.

Mindy Diamond:

Feel free to email or call me. If you have specific questions, I can be reached by cell at (973) 476-8578 or by email at mdiamond@diamond-consultants.com. Please note that all requests are handled with complete discretion and confidentiality. And again, if you enjoyed this episode, feel free to share it with a colleague who might benefit from its content. And if you're listening on the Apple Podcasts app, I'd be grateful if you gave it a star rating and a review that will let other advisors know if it's a show worth their time to listen to.



EPISODE TRANSCRIPT

Industry Update: A Powerful Strategy to Accelerate Growth for Financial Advisors

A Conversation with Louis Diamond

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