LISTEN AND LEARN

BMO's Ben Jones picks the essential podcasts every advisor should listen to

For financial advisors seeking new insights into their work, podcasts offer an easy, portable and info-packed way to get educated. But which podcasts should advisors listen to? With hundreds of thousands of podcasts crowding the internet, finding the right one can be a trial in patience. To get a handle on some of the best podcasts for financial advisors, we asked Ben Jones of BMO Global Asset Management, who co-hosts an award-winning advisor-focused podcast, Better Conversations. Better Outcomes. Whether you're looking to explore practice management tips or broad economic theory, his choices below illustrate how the right podcast can help motivate advisors to build better and more durable practices.

Planet Money

Learn More

NPR's podcast explains our complex economy in layman's terms, drawing on current events and surprising stories. Tune in to deepen your understanding of how our global economy really works, and its application to the everyday.

Memorable Episodes: The Planet Money T-Shirt series following one T-shirt through the entire supply chain, from cotton field to consumer. (2013)

Ben says: "Great storytelling, and short enough for even quick commutes."

Between Now and Success

Learn More

Host Steve Sanduski is founder of Belay Advisor, which offers a variety of coaching and consulting services to financial advisors. Sanduski's podcast features interviews with successful practitioners, leaders and visionaries on how they got to the top of their game. Advisors at every level of experience can take away ideas on how to succeed at "the intersection of business, investing and life."

Memorable Episode: MIT research fellow has mind-blowing thoughts on the future of advice (April 11, 2016)

Ben says: "Sanduski's grasp of the advisory business and technology delivers real insights for advisors."

EconTalk

Learn More

Takes a broad view of economics and economic theory. Host Russ Roberts and distinguished guests cover topics including finance, healthcare, free trade, and "the curiosities of everyday decision-making." Advisors can enrich their knowledge of big ideas and worldwide challenges through an economic lens, and apply it to better grow their practices and serve clients.

Memorable Episode: Richard Thaler on Libertarian Paternalism. (Nov. 6, 2006)

Ben says: "These are deep dives… I like to listen while I am on a walk or gardening."

The Small Business Big Marketing Show

Learn More

Explores practical marketing strategies to help small business owners reach and engage new client prospects. Advisors can learn about a variety of modern, cost-effective tools to grow their practices. Before tuning in, make sure you grab a pen and paper: Founder and host Tim “Timbo” Reid’s advice on snagging more customers is often just as actionable as it is innovative.

Memorable Episode: Huxtaburger’s Daniel Wilson on how sharing your knowledge can build you a tribe. (March 20, 2017)

Ben says: “Tim Reid is a super high-energy host, so get ready for a ride. I always walk away with some new actionable idea.”

Masters in Business

Learn More

In this finance-focused show, host Barry Ritholtz (a Bloomberg View columnist and co-founder of Ritholtz Wealth Management) interviews business leaders on “ideas that shape markets, investing and business.” Advisors can learn about the ideas and conversations that are shaping the markets today and tomorrow.

Memorable Episode: Matt Wallaert Is on a ‘Chief Behavioral Officer’ Mission (Aug. 10, 2017)

Ben says: “Barry is a knowledgeable interviewer. Both high-profile and lesser-known guests make this a consistently interesting show.”

BEN JONES’S FIVE FAVORITE EPISODES OF **BETTER CONVERSATIONS. BETTER OUTCOMES.**

On his Better Conversations. Better Outcomes. podcast, Ben Jones and co-host Emily Larsen interview guests about conversations at the intersection of emotion and money. The podcast recently won an education thought leadership award at WealthManagement.com’s 2017 Industry Awards. Here are five of Ben’s favorite episodes—and why advisors should listen.

Learn More

Investor archetypes: *Tailoring your communication to match your clients’ personalities* (Sept. 12, 2016) Guest: Matt Smith, author “Our first episode, and still one of our most popular with listeners. Advisors tend to communicate to all clients in the same way. Matt explained how to segment investors by archetype, then tailor communications to improve each one’s experience.”

Building an effective practice featuring Steve Moore (Sept. 19, 2016) Guest: Steve Moore, author and coach.
“This was part one of our miniseries with Steve on building an advisory practice. Steve is an impressive strategic coach; every time I speak with him I come away with more clarity around the power of focus in business.”

Helping clients determine who will be their caregiver (Jan. 23, 2017) Guests: Dr. Amy D’Aprix and Dr. Alexis Abramson
“Our two experts shed light on the uncomfortable and awkward conversations advisors need to engage in to be effective. This episode offered questions and techniques to coach a client through those discussions.”

Boomerang marketing with Tim Reid (May 31, 2017) Guest: Tim Reid, author and marketing expert
“I’m a big fan of Tim’s show as noted above, so it was exciting to have him on ours. Advisors often overthink what it takes to market their practice. Tim offered six simple steps to get started right away.”

The advisor’s guide to buying or selling a practice (Aug. 9, 2017) Guest: David Grau Sr., Founder of FP Transitions
“Many advisors say they want to buy a practice, but few are actually qualified buyers. This was an overview of things