

Synergize Podcast Transcript – Anthony Stich Episode

Guest: Anthony Stich, Chief Marketing Officer and Moran Wealth Management

Hosts: Bill Coppel, Director of Client Growth at TradePMR (a Robinhood company), and Ryan Neal, Editorial Manager at TradePMR

Bill Coppel: Welcome back to Synergize. I'm Bill Coppel, Director of Client Growth at TradePMR, a Robinhood company.

Ryan Neal: And I'm Ryan Neal, Editorial Manager at TradePMR Robinhood. And Bill, we're back here in 2026. And something that you and I are starting to think about, probably because registration is now open for TradePMR's Synergize conference. But we're looking at our travel schedule. We've got the conference season coming up. Things are starting. Our calendars are booking up. How about you? Do you got anything on the horizon you're looking forward to?

Bill Coppel: No, absolutely, Ryan. I've probably got at least four already in the book and more to follow. And I can tell you, having been in the business for as long as I have, you know conferences are a very, very important part of our industry. And a lot of folks seem to think that there's some kind of a mini vacation and people are out partying, having a good time. And clearly that does take place. But I would say that if you're prepared and you think through the opportunity that's in front of you, you build a list of folks you want to meet and you make it a point to do that because I'll tell you what I've taken away from these conferences in the past is I've learned a tremendous amount from peers and colleagues in the industry. And if you go with an open mind and a willingness to contribute, it can really work out well. But I think that the most important thing is you really got to have a plan.

Ryan Neal: Yeah It's interesting because as a reporter, I went to so many, especially early, early in my career. I was the only person in the newsroom that wasn't married and didn't have kids. So basically every industry event like "Ryan go," which you know is great. I love the travel and it was fun. I learned a lot as well. But it was always kind of curious about what people got out of it. And so we're to talk a little about that today with our guest, who I'm very excited to have on the show. I've known him for many, many years. And he did a story for RIA Reflections, one of our launch stories, I believe, around, I think it was called The Art of Disagreement. And it was on how he found a passion for cigars and going to so many conferences and and sort of really what it taught him about getting out of his a bubble, getting out of the bubble of conference circuit and having conversations with people outside of that bubble and and getting into disagreements even and talking to people that don't you don't see eye to eye with and being able to have that connection and in the cigar room, which is a It's a great story. If you haven't seen it, RIA Reflections, check it out. Let's welcome to the program. It's Mr. Anthony Stich. I hope I did that right. Also known to me as Mr. Purple. Today, he is the chief marketing officer of Moran Wealth Management. Tony, welcome to the welcome to the program.

Anthony Stich: Ryan and Bill, thank you for having me. I'm a longtime listener, first time guest. And yeah, I'm excited to talk about conferences and the lost art of disagreement.

Ryan Neal: Would you want to maybe start off for our audience? ah and i know you're one of those guys that's around and and most people kind of know who you are, but do you want to talk a little bit about your background and what you're up to these days?

Anthony Stich: Sure. So I will give you the way back because I think it's true, Ryan, you and I, and even Bill, I've known you both for the greater part, well, a decade, more than a decade probably now, if you look back at when I began visiting conferences within this industry. So a history lesson on myself. I was notably known for my time at Naviplan, a financial planning software. I was a COO there for, I don't know, six six years or something like that. I oversaw global sales, marketing, professional services, and client success. We sold that company to InvestCloud. And I've done a couple tours of duty since then. I tried starting up a new custodian. Robb told me, don't bother. And so I listened to him and I stepped away from that. I did some consulting and now I'm the chief marketing officer at Moran Wealth Management. There's actually an interesting story there too. I was approached by them many years ago about a job based on my time at conferences and my time on stage, quite frankly. um But yeah, that's kind of the background on me. So I've been a recovering fintech guy, and I'm on the other side of the aisle at a \$5 billion RIA down in Naples, Florida.

Ryan Neal: Nice. Well, if there's a good story there, maybe we'll have to have you as our first repeat RIA Reflections author if you've got another good story for us to tell.

Anthony Stich: Ah I love it

Ryan Neal: Well, Bill, you want to take it off? You want to launch our question here?

Bill Coppel: Yeah, yeah I do. You know, Tony, it's really remarkable when I look at your career and the places you've been and the different opportunities you've had. And you are a personality. People know who you are. You are invited to speak at a number of conferences. So, you know as you think about that journey that you've been on, how has your thinking evolved relative to attending conferences? And what's the kind of thing that you look for to decide whether or not it's appropriate to be there?

Anthony Stich: So that's a great question. Quite frankly, it's a million dollar question because I remember when I began at Naviplan back in 2014 15, industry conferences on the vendor side can be quite expensive. It's a big investment to go out there, to get the booth, to get all the materials along with the booth, all the travel, the dinners and the expenses. And there's always a conversation around that. There's always this discussion around considering whether or not we continue to invest in conferences. And we made our case and I could talk about that side of the case, but I won't. I'll talk about the advisor case for conferences and how you determine which ones to go to. I've been to them all, quite frankly. In fact, you know, now that we're in 26, I'm already looking at three in the first quarter, probably a fourth in the first quarter, fourth first

quarter, excuse me, that I'll be attending a couple on stage and a couple of just as attendees. Bill, I go into conferences a little bit differently. ah Obviously, you get you know you get in you get out what you put in, for starters, right? It's really, you need to go in with the right mindset. If you're an advisor, are you looking for ways to improve your business and practice management? Are you looking to purchase technology? Are you looking to talk to other folks like yourself to improve how you not only interact with your clients, but how you operate your business? You really have to understand the needs that you have that'll help you then determine which conferences are the most valuable for you, which ones you'll benefit most from. But I bring up the whole garbage in, garbage out, because what I've found in my time at conferences, and I've been to many, is that I allocate a few different things that I probably never admitted before. One being, give yourself time. That's called unstructured time, right? Don't book every hour of every day with a seminar or excuse me, like a, you know, I need to go to these break breakouts I need to be at this booth at this time, meals at this time. Give yourself unstructured time because that's when the meaningful conversations happen, right? I joke a lot about at conferences, the biggest deals get done at the lobby bar before 11 p.m. Right. You know, it's finding that unstructured time at these conferences to really be open to those conversations, which I know we're going to get into more later on in the show. And then the second thing, and this is crazy. This is a little bit. I've never brought this up before, but give yourself time to recharge. Right. You need a battery to operate in these events. You need to be on your game all the time. You're thinking, you're interacting, you're going to booths, you're trying to find a spot to eat. These are all things that can really drain that battery. So save some time too to get back up to your room and recharge. Take a step outside and get some fresh air. Really just to kind of reset yourself. Say, what didn't I do today that I wanted to get accomplished? Because those are the kind of checklist items that I like to do before conference to make sure I'm maximizing the value. Ryan knows this. Bill, you know this too. I have five kids. And it's really hard for me to get out of the home and attend a conference. So when and if I do, I am all in. I get there before the first stage, the first thing on stage. leave at the end, right? If I'm going to get on a plane, it's not going to be a parachute in, especially when I'm speaking. I like to be there from bell to bell, as I call it. Because I'm going to take the time away from my family, I'm going to maximize my time at this conference.

Bill Coppel: Now, I couldn't agree more. In fact, when I've been on the conference circuit speaking, I've always made it a point to be sure I'm there for every presentation, certainly before me. And then I want to hear from the folks afterwards. And, you know, that information has actually had me modify my comments on the fly to hit the audience and to try to help folks walk away with a little data point. But what I want to ask you, which I thought was interesting, just dawned on me, you've kind of gone from one side of the aisle to the other, right? So you started out, you know, certainly with Navajo playing, attending conferences as a fintech. And now you're attending conferences as I'm going to call you an advisor for, I know you're running marketing for Moran, but the idea here is you kind of move from one side to the other. Talk a little bit about how you may have adjusted your lens around deciding not only what conferences to go to, but what you want to accomplish.

Anthony Stich: Well, I think it's the best of both worlds, because I've been to them all. So now on the other side of the aisle, as representing an advisory firm, I still want to go for those same, very same reasons though, because what I've found at industry conferences, most notably is it's an opportunity for you to learn from others. Bill, to your point, I've been at conferences where I've went, I'm an award-winning CMO. I've won awards in this, but I'll be the first to tell you I am front row when other CMOs are on stage because I'm to steal those ideas. like I'm going to take what's good. right it's a point It's an opportunity to learn. right It's an opportunity to hone your craft. But what as now as an advisory firm, I look at them in the same way, but with the different lens. Am I shopping for technology? If so, I'm going to go to X, Y, and Z, right? By the way, I'm not, you didn't tell me to do this before the show. I've been to your conference a handful of times. It's one of my favorites. And I'll tell you why. because it's not too big. It's not too small. There's the right people in the room, the right vendors in the room at Synergize. And it's that really perfect size, right? I've been to the ones that are 4,000 or 5,000 people. I've been to the ones that are 100 people. Synergize right in the middle. So as an advisor, I look for those kinds of opportunities now. The ones where you know you don't need to rush around to see everything. You don't need to like, oh, I have to get to this person. I have to talk to this consultant. I have to do this, this, and this. When there's a little bit less in the room, it feels more impactful. It doesn't feel as exhausting. And so that's what I'm looking for. I'm looking for conferences now that aren't the big juggernauts. They're not the tiny niche ones. They're right in the middle where you get the best of all the worlds, right? And typically, to be fair, even though I live in Florida, I have a home in Wisconsin. So for the longest time, I was looking for conferences in San Diego and Miami and all other warm locations. But as an advisor now, I do look for that kind of that middle zone, right? The meaningful ones where there's mindshare happening, there's good folks on stage, and then there's good vendors to look at to advance your practice.

Ryan Neal: Well, Tony, you just made ah my the day of our um our colleague, Katie, whose job is to sell the Synergize Conference and get sponsors. When I tell her that we're going to have a clip on the podcast she can use, she's going to be absolutely delighted. But for our compliance friends listening in on this, that was not paid. We did not rehearse that. and we are not affiliated. So that was all good for now.

Bill Coppel: Kind like that whole Goldilocks effect that we're able to create. Apparently we synergize. Not too big, not too small, just right.

Anthony Stich: That's right.

Ryan Neal: Well, i love the idea about like recharging the battery because I kind of found um a new appreciation for when I get into, you know, look, I love having the king size bed in the hotel, but i won I found appreciation for having the two queens because I can have the one I sleep in and then the one I could like keep my shoes on and like lounge for five minutes and recharge the battery when I have the opportunity.

Anthony Stich: Yeah. Yeah.

Ryan Neal: Great. Well, Tony, what I'd love to talk to you about a little bit is the story you wrote for us, the cigars and the art of disagreement. Because you're I think you're talking about this, about the unstructured time, right? like you go to towns and you're able to get away for maybe a couple hours and have these conversations that get outside of the work sphere, outside of the RAA sphere. um And you know I know sometimes you go with people in the industry there or you go with the reporters I don't know if you and I have ever actually done a cigar together. We might have, but I don't know if we have. But can you talk a little bit about why you wrote that story and why you find those interactions in that time valuable?

Anthony Stich: Yeah. So, you know, I do like that story a lot and I'm very grateful to Ryan, for allowing me to be one of the launch articles on our reflections, which has turned out to be an incredible publication. By the way, again, this was not paid for. This endorsement was not paid for.

Ryan Neal: Thank you.

Anthony Stich: So the reason why the story was important to me is because, well, obviously we're in you know, I think everyone's a bit on pins and needles, regardless of, you know, the conferences, just in general. I feel like there's this attention in the air. And then you kind of add in this layer when it comes to conferences of the busyness, right, of the running around. You know, when I was on stage a lot, I was behind the camera. I was on stage. I was shooting a podcast. I was meeting with clients and prospects. And it's a lot. Right. And this was a form of battery charging for me. But what allowed me to do is to step away from that, just that busyness, right? And that a bit of cacophony, if you will, and sit down and relax. And the entire article is genuine because I can tell you from, I've been in cigar bars globally, quite frankly, but rest assured you're going to sit down and enjoy a cigar and someone's going to want to talk with you. And it's really funny because there's a bit of a full circle here because you talk you hinted towards me being well-known in the industry and we \ can talk about Mr. Purple. We can get to that. But that's not what I think for me, it's that people know me because I try to listen and talk with them and converse with them. And the same holds true for cigar bars. It's not unidirectional, right? It's not, hey, I'm this guy on stage. I'm to tell you some things. I'm gonna walk away. No, no, no. I want to know your story. I want to learn more about you, why you approach me, right? Or what led you to watch my presentation, right? Because that conversation is so meaningful. And so when you apply that into these battery recharging, cigar lounges, coffee shops, what have you, the same holds true, right? If someone wants to take the time to say hello or interact, I want to give that back. And it did take time though. You know, when I wrote this article, I thought about how you have to reprogram your mind. Because we are taught so early on to talk at someone, right? And not really even listen, right? Truly listen. And this actually feeds well into the advice delivery process with financial advisors, actually authentically listening. And so in these cigar lounges, it truly was enjoyable because there's people from all walks of life. There are people that come from everywhere, diverse backgrounds. And this is a chance to hear and discuss and to listen in such a neutral kind of quote unquote safe way, which has been so meaningful for me. So I love doing that. I love sneaking away. I love sitting down and having a

conversation with someone. And quite frankly, you might, you know, like I've been at these, com I've been at cigar bars by myself and some comes up to me and it makes my day. You know, that little five minute interaction or that, even if it's a half hour, like that conversation with that person, I'll never see them again, but it really made my day. And if I can do it for someone else bidirectionally, like what, how incredible is that? And we're both enjoying obviously a cigar or an Arnold Palmer or cocktail or whatever. And then I get back to it. And then I'm back on the grind at the conference or work travel or whatever.

Bill Coppel: It'd be great to be able to take that, what you just described, you know, that's the essence of building a relationship with a client, right? How do you, How do you diffuse something where everyone is trying to defend their own agenda, right? As you put it, my words, not yours, but the idea that, you know, we're too busy trying to tell people what we think as opposed to really absorbing what, you authentically absorbing what they have to say. But it's, you just characterize in my mind, how advisors and clients relationships really need to evolve.

Anthony Stich: No, I think but there's a big segue here, Bill, about that, right? And we talk a lot about the advisory, you know, advice delivery process. And we talk about listening. And now you have note takers and AI tools. And I'm worried people are going to listen less and less and rely on them more and more. But here's the reality. To truly listen authentically, right, is to understand the comment behind the comment, the thought that drives the question from the client towards the advisor. And when you're a fiduciary, it's even more complex because to your point, Bill, you might not agree with the individual's take on the market, on where they're investing, what have you. And as a fiduciary, you have to maybe be contrarian to their position. However, there is some magic there because when you're really truly conversing, when you're listening, that gives you the opportunity to think, why are they making this statement? What makes them so motivated by this position, this holding, this goal, what have you. Because then if you are in disagreement with them on that, you might be able to find the root of that comment. And that root might be solved in alignment, right? Between you, the fiduciary and the client. So listening, this practice of conversational listening and understanding can go a long way in creating a happy client, right? So I'll give you an example. And I don't want to get too much into the weeds because obviously compliance is on the call and my compliance will listen to this, but you know we're in a historic bull run and there's going to be a time where that's going to end. I'm not making a prediction, but there's going to be where it ends. And there's people that might be gravitated towards some of these higher performing positions. And as the fiduciaries, we have to start to tell them, hey, I know you're seeing you know, these incredible returns, that's not going to last forever. And so what you need to do is understand why they have it. Is it just returns based or is there something else there? Because if you get to the root of that by genuinely listening and asking the right questions, you might be able to solve the problem and not be a contrarian. You might be able to solve the problem and get both you and the client and the spouse in agreement, which is so important. And that's really the impetus of you know this article about cigar smoking and disagreement is really about active listening and how you can apply that to a financial advisory practice. Yeah, I love that. And I think that everyone should find, you know, even if you don't like cigars, your version of the cigar bar, right? I think for me, when I go to the conferences and several days in a row covering every session and then writing

articles and then attending the networking things, after a couple of days, I just need to get away and kind of be on my own. And I try to find whatever... town or city I'm in, I try to find a sports bar. And especially in the summer when baseball's on, I try to find a place that'll show me ah one of my California teams. I'll just go and sit and watch baseball or basketball or whatever. And, and then the same thing, then you get in conversations with folks and then, uh, It's just a great time, or I'll bring some folks with me from the conference and just tell them no work. We're gonna work. It's just going to watch baseball and talk about other stuff, and it's so refreshing. And then you go back and you feel recharged. So I'm kind of curious. yourself um How about Bill? I want to know what Bill's recharge is. I'm going to guess it has something to do with a healthier activity than the two of us. I'm going to get up in the morning and need good jogging.

Bill Coppel: Well, no, I, you know, it's, it's a great point. You know, I do like to get up and work out in the morning with some sort of form of exercise to clear my head. But during the day, you know, as Tony said, if you're attending a conference in a way to achieve productivity for yourself, right, put effort into it, it can be extremely tiring. And to take time to relax a little bit in the afternoon or step away, go for a walk um or go to a bar and have an adult beverage or perhaps a cigar, these are all good things. I think that the thing that I really gravitate to and what Tony, what you said was essentially it's a very disarming environment. You know, people begin to feel more comfortable with each other. They start to open up. And I think that's a big part of why when you open up, you naturally become better at understanding someone else's point of view and how they got there. You know, we live in a world that's measured in nanoseconds. And no one spends any time listening to anything, right? It's just constant noise. And you may not agree with that person's initial comment, but once you have that opportunity to break it down in a disarming environment, as I mentioned, you begin to see things differently. So, Tony, I think it's incredibly wise and insightful wisdom that you're sharing with our audience, and it takes effort. It's not easy, is it?

Anthony Stich: No, it's not. You nailed it, though. Disarming, right? And you know to the point about you working out in the morning, riding at the sports bar. By the way, I've been with you at the sports bars. It is a great time. To the cigars, not only disarming because it's unstructured, but also there's a unity, though, right? There's a unity. There's we We have more, everyone has more alike than they have different, right? And, but sometimes when you go into that pocket of the cigar enthusiasts or the, you know, sports enthusiasts or the active life enthusiasts, you begin to again, disarm, but also, Hey, we have more alike than we have different. And that's when conversations happen. And quite frankly,

You know, I think that sometimes there's another thing, too, there's the ability to speak more freely amongst those you don't know personally. Right. You might be more inclined to be a little bit more revealing, if you will, because it's just like I might not see this person again. Right. And I'm not saying like, you know, you go out there and you confess all your sins. But what I am saying is like it's just, again, disarming people. speaking more freely and it feels good and it feels good to listen and it feels good to understand the other side's take on any given matter. Right. And not be ashamed to say, well, I don't, I don't agree with you here and here's why, but truly again, listening. So I, but I think we should, we have to punctuate at that point. It's

disarming. And that's really what helps listening and conversing with one another. That's great. Well, Tony, I think I'm going to move to start wrapping things up here because I think we're coming up on our time. What we love to do on this podcast is we love to end each episode with some actionable insights for our listeners, whether it's for growth or maybe in this case for advisors planning out their conference season this year and are on the fence. Is it worth it? Is it worth all the expense and the time? um what's your takeaway for them? Why do you still go to these events and what could they do to maybe make it more worth it?

Anthony Stich: Sure. That's a great question. And because there is expense and they're you're leaving your home, you're leaving your family, you know, and you're diving in. And so I would encourage a few things. I would say first and foremost, you know, when you're setting your goals for 26, when you're looking at your weaknesses, your opportunities, you say to yourself, what do I need to improve in as an advisor? You know, is it growth or is it practice management or is it technology? Because once you determine those, that helps you set down a path of what shows, or excuse me, what industry conferences you should look at going to. And then what I would do is I look at shows in a little bit different of a way. I look at the schedule, the agenda, and I and I look at, again, unstructured time. Like what time can I have for myself? But also you look at the breakouts. You look at the talk the tracks, if you will. And then you look at the vendors. And you really begin to kind of you know settle down on a few different things that you might prefer to do.

And so let's just say you pick maybe one or two conferences to attend each year. Maybe one's tech heavy, you know, one is practice management heavy. And then what I would, again, suggest is developing that rubric that that kind of like, this is what I want to get out of the show and this is how I'm going to do it. You know, and you build out a bit of an agenda, right? Don't try and do everything because you're kind of—you're not going to make it. You know, it's going to be very tough to do. Make sure you carve out time for yourself. But I strongly encourage these conferences, especially for advisors, there's no better time to talk to advisors in different states, right? In different size practices and really pick their brains on how they do things. I've watched, I've hosted conferences.

Bill Coppel: And I was going to say, in and Tony, at different locations on their career arc, particularly with the issues of an aging advisor population, trying to attract younger ones, this is a great opportunity for young advisors to meet people at different points in their career.

Anthony Stich: That's a really good point, Bill, because it not only, you know, could there be a succession plan discussed over time, but it could be an opportunity to say, how did you get here? How did you get to \$5 billion? That's what I want to do. What obviously going to Tom Moran and being like, how'd you get to \$5 billion? dollars He'll be like, okay, how much time do you have? Right. But it's a matter of being, being you know you know, but being, you know, just going out there.

Right. And being a bit just not direct. That's the wrong way to put it. It's just going out and talking to folks because I'm telling you, that I was going to say I've been a part of large conferences. I

worked at Market Council for a time. I helped at the summit. My most enjoyable memories is we were watching the advisors exchange notes.

The ones are saying, how did you do this? How did you do this? Can I call you back when I get back? We talk through this? You'd be surprised at how many advisors have created this network from these events of calling a friend and saying, what did you do here? What did you do with this client? How did you grow to this point? That to me is the most meaningful, right? Like, yeah, the stage, you know, you want to watch people on stage, they give you presentations, there's panels, it's great, take some notes.

But you know when you're having lunch you know out in the veranda or whatever, and there's an advisor across from you, ye ask them questions. You know, learn about them because that's where the magic happens. So ah my tidbit, though, my last bit of advice truly is going in with the mindset that you're going to maximize the value of this investment of time and money to better your practice.

And having that rubric of things you want to accomplish to achieve those goals, you will leave that conference a better person. You'll leave that conference a better practitioner and maybe even a better technologist. And it'll help grow your business. I've recommended advisors to conferences before. Now they've been there three, four, five times and they saw the light because it's always the tough hurdle. It's always the tough hurdle of, I just don't want to fly there. And don't want to spend this money. I'm really awkward and introverted. I'm not going to get along with anyone. Like you create all these barriers, right? And then the ones that jump over those barriers saying, I want to better myself as a person and go to those conferences. I see the fruits of that.

And I've talked to people that I've recommended conferences to, and they said, Tony, thank you so much. I'm going there every year from now on. It's been incredible. And quite frankly, I developed long-term friendships with folks like you, Bill, and you, Ryan, and everyone else in the industry, because we go to those conferences, we see each other, you know, we, we kind of have, we break bread together and we do this and that. And it's also a means of developing long lasting relationships, but most importantly, long lasting friendships. And, know,

That's what made these conferences so special to me. And that's why even though I'm on the other side of the aisle now, you're going to see me on the road because they're meaningful, not only in terms of my own professional development, but also helping Moran Wealth Management grow, right? But ultimately helping me grow as well.

Ryan Neal: Great. Well, thanks for that, ah Tony. It's great to have you on the podcast. And I don't know if your travels are bringing you up to ah to New York anytime in the coming year. But if you are, say hi. Maybe we'll stop by the Carnegie Club.

Anthony Stich: Yeah, that's a date. It'll happen for sure. That's my favorite spot in the city. You know that. Absolutely. Ryan, thank you so much for having me. Bill, thank you as well.

Ryan Neal: All right, and thank you, Tony, and thank you, everybody, who listened to the podcast, wherever you're getting this, YouTube or Apple or Spotify or any platform you do your podcast. If you could take time to like, subscribe, share, comment, any of those good things, they're all helpful for the algorithm. We appreciate you, and we'll catch you on the next episode.

Bill Coppel: That's right, Ryan. And make sure you tune into that where we'll bring even more insights and actionable ideas to help you grow your business. And remember, the challenge is yours to capitalize on what the future offers.

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