

## BARRON'S

**CLM** Barron's Cover - Main  
**HD** **What's Next for Healthcare --- From biotech to managed care, companies are focused on new challenges—and opportunities. What's at stake, and where to invest now.**  
**BY** By Lauren R. Rublin  
**WC** 6,536 words  
**PD** 26 September 2022  
**SN** Barron's  
**SC** B  
**PG** 20  
**LA** English  
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**LP**

Thanks to vaccines, treatments, and preventive measures, the Covid crisis has eased, even if the pernicious virus persists. The pandemic's evolution gives healthcare companies a chance to focus on other issues, including drug-patent expirations, pricing pressures, regulatory changes, and deal making. For investors, a bear market in stocks adds another wrinkle—and an opportunity to snap up shares of the industry's most promising companies on the cheap.

This year, Barron's annual healthcare roundtable focuses on emerging themes across the industry, from the ability to "interrogate" biology with computational tools to the evolution of value-based care. The challenges are many, but the news is good, not only for innovative biotech and cash-rich pharmaceutical companies, but also for nimble managed-care providers and purveyors of much-needed medical devices and life-sciences tools.

**IN** i2569 : Biotechnology | i951 : Healthcare/Life Sciences | i257 : Pharmaceuticals | i3302 : Computers/Consumer Electronics | i330202 : Software | iaer : Aerospace/Defense | icnp : Consumer Goods | iconst : Construction | icph : Computer Hardware | idurhg : Durable Household Products | iint : Online Service Providers | itsp : Transportation/Logistics | i2572 : Vaccines | icomp : Computing | icre : Real Estate/Construction | idrugty : Specialized Drugs/Medications | iindstrls : Industrial Goods | itech : Technology

**NS** gbiot : Biotechnology | gimmu : Immunizations | c133 : Patents | ccat : Corporate/Industrial News | ghea : Health | gsci : Sciences/Humanities | ncolu : Columns | npag : Page One Stories | c151 : Earnings | c15 : Financial Performance | cgymtr : Intellectual Property Rights | cinprp : Industrial Property Rights | gbiol : Biology | gcat : Political/General News | gtre : Medical Treatments/Procedures | ncat : Content Types | nfact : Factiva Filters | nfcpin : C&E Industry News Filter

**IPD** Barrons.com

**IPC** 4503.TO

**PUB** Dow Jones & Company, Inc.

**AN** Document B000000020220923ei9q000dx

**HD** The Last Big Activist Still Standing --- Elliott Management is going after PayPal, Pinterest, and other stocks. Following its bets could prove costly.

**BY** By Carleton English

**WC** 2,130 words

**PD** 26 September 2022

**SN** Barron's

**SC** B

**PG** 26

**LA** English

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**LP**

For much of this year, PayPal Holdings stock couldn't find a floor. Not only did the payments company lose its pandemic luster, but it also lost credibility on Wall Street after cutting ambitious growth targets in February. Amid the [selloff](#), PayPal's chief financial officer took a job at Walmart. Investors took off, too, sending the stock down 60% through mid-July.

But one investor, in particular, saw value and came equipped to orchestrate a turnaround in the stock: Elliott Management.

**CO** xcmcrp : PayPal Holdings Inc | ellas : Elliott Capital Advisors, L.P. | ellmcz : Elliott Management Corporation

**IN** i8150105 : Consumer Lending | i8394 : Computer Services | ibnk : Banking/Credit | ifinal : Financial Services | ihedge : Hedge Funds | iinv : Investing/Securities | itech : Technology | iwealth : Private Banking/Wealth Management | i814 : Banking | i81501 : Credit Types/Services | i81502 : Trusts/Funds/Financial Vehicles | i831 : Financial Investment Services | ialtin : Alternative Investments | ibcs : Business/Consumer Services | i83107 : Portfolio/Fund/Asset Management | ifmsoft : Financial Technology | impay : Mobile Payment Systems | iplastic : Electronic Payment Systems

**NS** m11 : Equity Markets | mcat : Commodity/Financial Market News | c173 : Financing Agreements | npag : Page One Stories | c151 : Earnings | reqris : Suggested Reading Investing/Securities | c15 : Financial Performance | c17 : Corporate Funding | ccat : Corporate/Industrial News | ncat : Content Types | nfact : Factiva Filters | nfce : C&E Exclusion Filter | nfcipin : C&E Industry News Filter | redit : Selection of Top Stories/Trends/Analysis | reqr : Suggested Reading Industry News

**IPD** Barrons.com

**IPC** 6502.TO

**PUB** Dow Jones & Company, Inc.

**AN** Document B000000020220923ei9q000jh

**CLM** Best Practices  
**SE** Advisor Center  
**HD** **David Canter: Into the Buyout Fray at Bluespring**  
**BY** By Steve Garmhausen  
**WC** 2,394 words  
**PD** 23 September 2022  
**ET** 20:16  
**SN** Barron's Online  
**SC** BON  
**LA** English  
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**LP**

[David Canter](#) has been a longtime fixture in the registered investment advisor industry: He's best known for leading the RIA segment within the institutional arm of Fidelity Investments, where he spent nearly 13 years before decamping in August. "I like to say that I was playing in the nightclubs and bars of the RIA model before it became an overnight success," says Canter.

**CO** fmrc : FMR LLC  
**IN** i831 : Financial Investment Services | ibnk : Banking/Credit | ifinal : Financial Services | iinv : Investing/Securities | iwealth : Private Banking/Wealth Management | i814 : Banking | i83107 : Portfolio/Fund/Asset Management  
**NS** cacqu : Acquisitions/Mergers | ccat : Corporate/Industrial News | c181 : Acquisitions/Mergers/Shareholdings | cactio : Corporate Actions | ncolu : Columns | c18 : Ownership Changes | ncat : Content Types | nfact : Factiva Filters | nfcpin : C&E Industry News Filter  
**RE** usa : United States | namz : North America  
**IPD** Advisor Q&A  
**IPC** FIN.XX  
**PUB** Dow Jones & Company, Inc.  
**AN** Document BON0000020220923ei9n001gt



**CLM** Best Practices  
**SE** Advisor Center  
**HD** **Podcast: Succession Planning, Next-Gen Talent, and What Top Leaders Do**  
**BY** By Greg Bartalos  
**WC** 4,146 words  
**PD** 21 September 2022  
**ET** 01:21  
**SN** Barron's Online  
**SC** BON  
**LA** English  
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**LP**

Advisory firms are in a [war for talent](#) and desperately seeking next-generation employees who can eventually become [tomorrow's leaders](#).

In a recent interview with Ray Sclafani, the CEO and founder of ClientWise, a coaching and training company serving the financial services industry, I asked where he was seeing increased interest among clients. He immediately responded, "Oh, by far it's the succession work. It's the next-generation piece...I would say that's number one that's really emerged."

**NS** cdinn : Business/Disruptive Innovation | ccat : Corporate/Industrial News | c41 : Management | ncolu : Columns | niex : Interviews with Corporate Executives | ncat : Content Types | nfact : Factiva Filters | nfcpx : C&E Executive News Filter | nfcpi : C&E Industry News Filter | nitv : Interviews  
**IPD** Advisor News  
**IPC** N/CEO  
**PUB** Dow Jones & Company, Inc.  
**AN** Document BON0000020220920ei9k003e9

SE Barrons Magazine  
 HD **Netflix and Disney+ Are About to Get Ads. What It Means for Streaming Stocks.**  
 BY By Jack Hough  
 WC 2,241 words  
 PD 19 September 2022  
 ET 18:36  
 SN Barron's Online  
 SC BON  
 LA English  
 CY Copyright 2022 Dow Jones & Company, Inc. All Rights Reserved.  
 LP



PHOTO: Photo illustration by Barron's staff; (Squid Games) Dom Slike/Alamy

CO netfli : Netflix, Inc.  
 IN imsoft : Streaming Services | i3302 : Computers/Consumer Electronics | i971 : Audiovisual Production | i97411 : Broadcasting | iadv : Advertising/Marketing/Public Relations | ibcs : Business/Consumer Services | icph : Computer Hardware | iint : Online Service Providers | itech : Technology | i8395465 : Multimedia Content Services | icomp : Computing | idistr : Media Content Distribution | imed : Media/Entertainment  
 NS c22 : New Products/Services | ccat : Corporate/Industrial News | gent : Arts/Entertainment | givsto : Personal Investments in Stocks | m11 : Equity Markets | nimage : Images | npag : Page One Stories | cexpro : Products/Services | gcat : Political/General News | gpersf : Personal Finance | gpersi : Personal Investments | mcat : Commodity/Financial Market News | ncat : Content Types | nfact : Factiva Filters | nfce : C&E Exclusion Filter | nfcpin : C&E Industry News Filter  
 IPD Cover  
 IPC AAPL  
 PUB Dow Jones & Company, Inc.  
 AN Document BON0000020220916ei9g003ml



<b>SE</b>	Advisor Center
<b>HD</b>	<b>These Are the Top Independent Advisors and RIAs. How to Pick the Right One.</b>
<b>BY</b>	By Steve Garmhausen
<b>WC</b>	2,014 words
<b>PD</b>	17 September 2022
<b>ET</b>	01:30
<b>SN</b>	Barron's Online
<b>SC</b>	BON
<b>LA</b>	English
<b>CY</b>	Copyright 2022 Dow Jones & Company, Inc. All Rights Reserved.
<b>LP</b>	<p>Until the 1990s, massive Wall Street brokerage firms all but owned the market for investment advice. But amid growing demand for investment guidance and financial planning, big-name firms such as Morgan Stanley and Merrill Lynch now have some serious competition.</p> <p>Independent advisors, often working within registered investment advisor, or RIA, firms, are multiplying at a breakneck pace. From 2012 to 2021, the number of such firms in the U.S. increased 41%, to nearly 15,000.</p>
<b>IN</b>	i831 : Financial Investment Services   i814 : Banking   ibnk : Banking/Credit   ifinal : Financial Services   iinv : Investing/Securities   iwealth : Private Banking/Wealth Management
<b>NS</b>	ccat : Corporate/Industrial News   nran : Rankings   ncat : Content Types
<b>RE</b>	namz : North America   usa : United States
<b>IPD</b>	Top Independents
<b>IPC</b>	GM
<b>PUB</b>	Dow Jones & Company, Inc.
<b>AN</b>	Document BON0000020220916ei9g0035y

**SE** Daily  
**HD** **If This Seat Flips Red, Republicans Will Have 'Probably Won a Relatively Comfortable House Majority'**  
**BY** By Victor Reklaitis, MarketWatch  
**WC** 2,112 words  
**PD** 17 September 2022  
**ET** 00:25  
**SN** Barron's Online  
**SC** BON  
**LA** English  
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**LP**  
 FREDERICKSBURG, Va.—Holding a "Yesli Vega for Congress" sign for his lawn that he just picked up from one of the Virginia Republican's campaign offices, Clinton Melson says he and his wife plan to vote for her because of their concerns about schools, inflation and defense.  
 "We're all about education because we have grandchildren, and we just think that the Republican Party in general and Vega in particular are better for education," said Melson, a retired resident of Virginia's Stafford County, which lies just north of Fredericksburg.  
**NS** gpol : Domestic Politics | gcat : Political/General News | gvote1 : National/Presidential Elections | ghea : Health | gpir : Politics/International Relations | gvcng : Legislative Branch | gvote : Elections | gabor : Abortion | gtrea : Medical Treatments/Procedures | gvbod : Government Bodies  
**RE** usa : United States | usva : Virginia | namz : North America | uss : Southern U.S.  
**IPD** Politics  
**IPC** G/CIA  
**PUB** Dow Jones & Company, Inc.  
**AN** Document BON0000020220916ei9g002s1

**SE** Daily  
**HD** **Wall Street Predicts Another Volcker Moment to Tame Sticky Inflation**  
**WC** 2,017 words  
**PD** 14 September 2022  
**ET** 16:33  
**SN** Barron's Online  
**SC** BON  
**LA** English  
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**LP**

The Federal Reserve was slow to act when inflation reared its head and markets were too fast to think that policymakers had done enough to contain it.

After the [latest readout](#), which shows inflation remains strong across the board, it is clear the Fed must up its game and investors should curb their optimism.

**CO** fed : Board of Governors of the Federal Reserve System  
**NS** e1103 : Inflation Figures/Price Indices | e11 : Economic Performance/Indicators | ecat : Economic News | npred : Economic Predictions/Forecasts | ncat : Content Types  
**RE** namz : North America | nyc : New York City | usa : United States | usdc : Washington DC | use : Northeast U.S. | usny : New York State | uss : Southern U.S.  
**IPD** The Barron's Daily  
**IPC** 8604.TO  
**PUB** Dow Jones & Company, Inc.  
**AN** Document BON0000020220914ei9e000rt



CLM Barron's Cover - Main  
 HD **How Bitcoin Bombed in El Salvador --- The first country to adopt Bitcoin as a legal currency is now grappling with the aftermath. What it means for digital payments.**  
 BY By Sabrina Escobar  
 WC 2,976 words  
 PD 12 September 2022  
 SN Barron's  
 SC B  
 PG 18  
 LA English  
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 LP



Dominga de Jesus accepts payments in Bitcoin at his flavored ice cart on the beach.  
 PHOTO: Photograph by Fred Ramos for Barron's

CO imonf : International Monetary Fund  
 IN ivicu : Virtual Currencies/Cryptocurrencies | i831 : Financial Investment Services | i8394 : Computer Services | ifinal : Financial Services | itech : Technology | iinv : Investing/Securities | ibcs : Business/Consumer Services | ibnk : Banking/Credit | ifmsoft : Financial Technology  
 NS gcat : Political/General News | mcrp : Cryptocurrency Markets | m13 : Money/Currency Markets | m132 : Foreign Exchange Markets | ncolu : Columns | nimage : Images | npag : Page One Stories | reqris : Suggested Reading Investing/Securities | mcat : Commodity/Financial Market News | ncat : Content Types | nfact : Factiva Filters | nfce : C&E Exclusion Filter | redit : Selection of Top Stories/Trends/Analysis | reqr : Suggested Reading Industry News  
 RE elsal : El Salvador | camz : Central America | lamz : Latin America | dvpcoz : Developing Economies  
 IPD Barrons.com  
 IPC I/BKS  
 PUB Dow Jones & Company, Inc.  
 AN Document B000000020220909ei9c000jh

**SE** Blog  
**HD** **Record Deals: Inside the Music Royalty Boom**  
**BY** By Abby Schultz  
**WC** 2,638 words  
**PD** 12 September 2022  
**ET** 21:21  
**SN** Barron's Blogs  
**SC** WCBBE  
**LA** English  
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**LP**

I Wanna Dance with Somebody, a biographical film about the life of late singer Whitney Houston, will be released in December by Sony Pictures. Music streaming of Houston's 1987 single "I Wanna Dance with Somebody (Who Loves Me)" is likely to spike soon after on services such as Spotify and Apple Music.

A benefactor of that uptick will be Primary Wave Music, a New York-based independent music company that in 2019 acquired 50% of Houston's estate, including a stake in the singer's royalty streams from her songs and master recordings and profit-sharing in her films, such as 1992's The Bodyguard.

**IN** i3302 : Computers/Consumer Electronics | i971 : Audiovisual Production | i97411 : Broadcasting | icph : Computer Hardware | iint : Online Service Providers | itech : Technology | icomp : Computing | imed : Media/Entertainment

**NS** c181 : Acquisitions/Mergers/Shareholdings | cacqu : Acquisitions/Mergers | cactio : Corporate Actions | ccat : Corporate/Industrial News | gdabal : Dance/Ballet | gent : Arts/Entertainment | gmusic : Music | nblog : Blogs | nrw : Reviews | gcat : Political/General News | c18 : Ownership Changes | ncat : Content Types | nfact : Factiva Filters | nfce : C&E Exclusion Filter | nfcpin : C&E Industry News Filter

**RE** usa : United States | namz : North America

**IPD** Barrons

**IPC** 6758.TO

**PUB** Dow Jones & Company, Inc.

**AN** Document WCBBE00020220912ei9c0002t

**HD** **Social Insecurity --- Millennials are convinced that Social Security will vanish by the time they retire. The reality is less dire, but big changes are looming.**

**BY** By Elizabeth O'Brien

**WC** 2,005 words

**PD** 12 September 2022

**SN** Barron's

**SC** B

**PG** 23

**LA** English

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**LP**

Will Bowron doesn't give much thought to retirement. The 32-year-old from Birmingham, Ala., is busy with his job at his family's coffee and tea roaster, his wife and young child, and a side career writing crime fiction.

But when he does get around to thinking about his future, Bowron doesn't imagine [Social Security](#) being any part of it. He has seen the headlines that the program's \$2.8 trillion retirement trust fund will become depleted in 2034, decades before he plans to retire. "The math doesn't work out," Bowron says.

**NS** gretir : Retirement Planning | gcoho : Generational Cohorts | npag : Page One Stories | gcat : Political/General News | gcom : Society/Community | gpersf : Personal Finance | ncat : Content Types

**IPD** SNRRETIREMENT

**IPC** G/SSA

**PUB** Dow Jones & Company, Inc.

**AN** Document B000000020220909ei9c000b5

**SE** Daily  
**HD** **BlackRock Bet Big on Climate Change. Now It's Being Targeted By the Anti-ESG Movement.**  
**BY** By Lauren Foster  
**WC** 2,031 words  
**PD** 10 September 2022  
**ET** 00:27  
**SN** Barron's Online  
**SC** BON  
**LA** English  
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**LP**

The financial lexicon got a new term in 2022: "anti-ESG." It's the latest incursion of politics and the culture wars into the financial sphere, and one that has thrust BlackRock, the world's largest asset manager, into the hot seat.

Over the past few months, the pushback against environmental, social, and governance investing—known as ESG—has escalated sharply, particularly in Republican-led states. In Florida, Gov. Ron DeSantis and the State Board of Administration adopted a resolution barring the state from considering ESG factors in its investment management practices. Texas has blacklisted 10 asset managers, including BlackRock, for supposedly "boycotting" the fossil fuel industry. West Virginia has barred five financial institutions, including BlackRock, from new state business on the grounds that they boycott fossil fuel companies. And with U.S. midterm elections looming and the country's political acrimony showing no signs of dissipating, this could be just the beginning.

**CO** blaman : BlackRock Inc.

**IN** iresinv : Sustainable Investment | iextrfu : Exchange Traded Funds | i1 : Energy | i831 : Financial Investment Services | ibnk : Banking/Credit | ifinal : Financial Services | ifosfl : Fossil Fuels | iinv : Investing/Securities | iwealth : Private Banking/Wealth Management | i814 : Banking | i81502 : Trusts/Funds/Financial Vehicles | ialtin : Alternative Investments | i83107 : Portfolio/Fund/Asset Management

**NS** cesg : Environmental/Social/Governance | ccpgvn : Corporate Governance | c41 : Management | ccat : Corporate/Industrial News | gpri : Politics/International Relations | gpol : Domestic Politics | gvot : Elections | gcat : Political/General News | ncat : Content Types | nfact : Factiva Filters | nfcpin : C&E Industry News Filter

**RE** usa : United States | usri : Rhode Island | namz : North America | use : Northeast U.S. | uss : Southern U.S. | ustx : Texas | usnew : New England

**IPD** ESG Investing

**IPC** I/AMG

**PUB** Dow Jones & Company, Inc.

**AN** Document BON0000020220909ei99003s5

**SE** Daily  
**HD** **U.K. Saw Enormous Growth Under Queen Elizabeth II. Global Markets Could Use Her Stability.**  
**WC** 2,056 words  
**PD** 9 September 2022  
**ET** 16:14  
**SN** Barron's Online  
**SC** BON  
**LA** English  
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**LP**  
  
The death of Queen Elizabeth II comes at an already unsettling time for the U.K.'s people and investors.  
  
Only two days before the nation's longest reigning monarch [died](#) at her Scottish estate, Balmoral, she anointed Liz Truss as the fourth prime minister, in little over six years, to run the country.  
  
**CO** eurcb : European Central Bank  
**IN** ibnk : Banking/Credit | iinv : Investing/Securities | imed : Media/Entertainment | ifinal : Financial Services  
**NS** ecat : Economic News | gcrim : Crime/Legal Action | gvbod : Government Bodies | gwhis : Whistleblowers | gcat : Political/General News | gpir : Politics/International Relations | gpol : Domestic Politics | groyal : Royal Families  
**RE** uk : United Kingdom | eurz : Europe | weurz : Western Europe  
**IPD** The Barron's Daily  
**IPC** AAPL  
**PUB** Dow Jones & Company, Inc.  
**AN** Document BON0000020220909ei990012x

**CLM** Best Practices  
**SE** Advisor Center  
**HD** **How Advisors Can Manage Their Social-Media Presence Like Pros**

**BY** By Greg Bartalos

**WC** 5,699 words

**PD** 7 September 2022

**ET** 00:25

**SN** Barron's Online

**SC** BON

**LA** English

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**LP**

Given that we live in what some call an "attention economy," the adage "out of sight, out of mind," especially resonates. As such, advisors should strive to not merely do great work but also ensure that clients and potential clients are aware of the work they are doing.

"We work in a referral business," says Jeff Bradanini, financial advisor and director of marketing for Beirne Wealth Consulting. "All the social-media stuff, the digital stuff is great, but when you're top of mind with clients, friends, centers of influence, you're more likely to get a referral that way."

**NS** glife : Living/Lifestyle | ncolu : Columns | nimage : Images | gcat : Political/General News | ncat : Content Types

**RE** namz : North America | usa : United States | usct : Connecticut | use : Northeast U.S. | usnew : New England

**IPD** Advisor News

**IPC** MER.XX

**PUB** Dow Jones & Company, Inc.

**AN** Document BON0000020220906ei96002s1

**HD**      **It Looks Like a Messy Fall for Markets. How to Navigate The Risks --- Wall Street strategists are sharply divided on the outlook for the S&P 500. No matter, there are plenty of bargains in stocks and bonds.**

**BY**      By Nicholas Jasinski

**WC**      2,600 words

**PD**      5 September 2022

**SN**      Barron's

**SC**      B

**PG**      18

**LA**      English

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**LP**

If 2022 were to end tomorrow, or the day after, it would enter the books as a dismal one for investors. The Dow Jones Industrial Average is down 13% year to date, the S&P 500 index is off 17%, and the once-bubbly Nasdaq Composite is nursing a loss of 25%.

The selling could continue into the fall and beyond, given the panoply of factors eating at investor confidence and returns. Inflation is stubbornly high, the Federal Reserve is determined to raise interest rates to cool it, and the world is an even more hostile place now than at the start of the year.

**CO**      fed : Board of Governors of the Federal Reserve System

**IN**      i1 : Energy | i82 : Insurance | icnp : Consumer Goods | ifinal : Financial Services

**NS**      m11 : Equity Markets | mcat : Commodity/Financial Market News | npag : Page One Stories | ncat : Content Types | nfact : Factiva Filters | nfce : C&E Exclusion Filter

**RE**      namz : North America | usa : United States

**IPD**      Barrons.com

**IPC**      ACN

**PUB**      Dow Jones & Company, Inc.

**AN**      Document B000000020220902ei95000dx

**CLM** Barron's Cover - Main

**HD** **Labor Pains --- The hope that the worker shortage would vanish as Covid fades into the background hasn't—and won't—come to pass. Instead, the U.S. is on track for a permanent labor crunch, one with root causes that go far deeper than the pandemic.**

**BY** By Megan Cassella

**WC** 2,201 words

**PD** 5 September 2022

**SN** Barron's

**SC** B

**PG** 14

**LA** English

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**LP**

In the summer of 2020, Mike Zaffaroni, the owner of Liberty Landscape Supply in Jacksonville, Fla., needed to start staffing up to fulfill a pair of contracts to plant trees around the city. At first the hiring went relatively smoothly, but as fall approached, things started to change: A growing number of candidates were failing to make it to their scheduled interviews. He would sometimes expect 10 people, but only one would show. "It's one of the most alarming things I've seen in my working career," he says.

In the two years since, Zaffaroni has raised his starting wages by nearly 40%. He expanded his benefits program, shortened his interview process, and began considering a broader pool of workers, including those with limited experience or a spotty work history. But none of it has been enough: His 112-person company still has 19 current openings and few prospects to fill them.

**IN** icnp : Consumer Goods

**NS** gjob : General Labor Issues | e11 : Economic Performance/Indicators | ecat : Economic News | gcrim : Crime/Legal Action | gillim : Illegal Immigration | gimm : Human Migration | gout : Outbreaks/Epidemics | gpir : Politics/International Relations | ncolu : Columns | npag : Page One Stories | npred : Economic Predictions/Forecasts | nstacs : Statistics | gcat : Political/General News | ghea : Health | gmed : Medical Conditions | gspox : Infectious Diseases | ncat : Content Types

**RE** namz : North America | nz : New Zealand | usa : United States | apacz : Asia Pacific | ausnz : Australia/Oceania

**IPD** Barrons.com

**IPC** G/FED

**PUB** Dow Jones & Company, Inc.

**AN** Document B000000020220902ei95000gq



**CLM** Best Practices  
**SE** Advisor Center  
**HD** **Steve Cassaday: How My 'Sixth Sense' Helped Me Build a \$4.6 Billion RIA**

**BY** By Steve Garmhausen

**WC** 2,154 words

**PD** 2 September 2022

**ET** 21:54

**SN** Barron's Online

**SC** BON

**LA** English

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**LP**

Want to build a business with snowballing growth? Steve Cassaday suggests you focus on client service. "You can completely control the service dimension of your business," says the founder and CEO of Cassaday & Co., a \$4.6 billion registered investment advisor firm in McLean, Va. "It's not based on interest rates or the Fed or Ukraine or any of that stuff; the outcomes and service quality are totally under your control."

Speaking with Barron's Advisor, Cassaday explains how training his staff to go the extra mile helps bring in "hundreds of millions of dollars" of new business every year. He reveals the reason the firm has never had a marketing budget, despite spending in the high six figures each year on the function. And he recounts a string of bold, spur-of-the-moment decisions 45 years ago that launched his career.

**NS** c31 : Marketing | ccat : Corporate/Industrial News | ncolu : Columns | cdom : Markets/Marketing | ncat : Content Types | nfact : Factiva Filters | nfcpin : C&E Industry News Filter

**IPD** Advisor Q&A

**IPC** N/CNW

**PUB** Dow Jones & Company, Inc.

**AN** Document BON0000020220902ei92002jp

**CLM** Barron's Cover - Main

**HD** **Water Worries --- The scarcity of water is rapidly emerging as a global threat that could disrupt businesses, crimp profits, and jeopardize growth. The scarcity of fresh water is rapidly emerging as a global threat that could disrupt businesses, crimp profits, and jeopardize growth**

**BY** By Lauren Foster

**WC** 2,171 words

**PD** 29 August 2022

**SN** Barron's

**SC** B

**PG** 16

**LA** English

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**LP**

When Bob Seawright moved to San Diego 27 years ago, the only thought he gave to water was about the glistening swimming pool in his backyard. These days, water—or the lack of it—is a fact of daily life. Seawright has twice been forced to evacuate his home in the suburb of Rancho Bernardo due to the threat of wildfires. And the lush vegetation that once adorned the surrounding landscape has given way to dirt, hardy ground cover, and rocks.

"We have changed all of the shrubbery and ground cover to make it much more 'water wise,'" says Seawright, chief investment officer of Madison Avenue Securities, and one of the 90 million Americans living under drought conditions.

**IN** icnp : Consumer Goods | ifurn : Furniture

**NS** gdroug : Drought | gnrsca : Natural Resource Scarcity | c151 : Earnings | e11 : Economic Performance/Indicators | ecat : Economic News | genv : Natural Environment | gntdis : Natural Disasters/Catastrophes | ncolu : Columns | npag : Page One Stories | npred : Economic Predictions/Forecasts | cpsht : Product Shortage | c15 : Financial Performance | c21 : Output/Production | ccat : Corporate/Industrial News | cexpro : Products/Services | gcat : Political/General News | gdis : Disasters/Accidents | grisk : Risk News | gwea : Weather | ncat : Content Types | nfact : Factiva Filters | nfcpin : C&E Industry News Filter

**RE** usa : United States | namz : North America

**IPD** Barrons.com

**IPC** G/NSA

**PUB** Dow Jones & Company, Inc.

**AN** Document B000000020220826ei8t0008d

**CLM** Best Practices  
**SE** Advisor Center  
**HD** **Video Killed the Radio Star but Can Give New Life to Advisor Practices**  
**BY** By Greg Bartalos  
**WC** 6,463 words  
**PD** 23 August 2022  
**ET** 23:22  
**SN** Barron's Online  
**SC** BON  
**LA** English  
**CY** Copyright 2022 Dow Jones & Company, Inc. All Rights Reserved.

**LP**

Technology is advancing at a breakneck pace yet many advisors are failing to adapt, creating an enormous opportunity for those nimble enough, and hungry enough, to seize the opportunity, says Mike Byrnes, founder and president of Byrnes Consulting.

By leveraging technology, advisors can become more operationally efficient and "wow their prospects and their clients," asserts Byrnes, who specializes in business planning and marketing strategy consulting services.

**NS** c31 : Marketing | ccat : Corporate/Industrial News | ncolu : Columns | nimage : Images | cdom : Markets/Marketing | ncat : Content Types | nfact : Factiva Filters | nfcpin : C&E Industry News Filter  
**RE** namz : North America | usa : United States  
**IPD** Advisor News  
**IPC** N/CNW  
**PUB** Dow Jones & Company, Inc.  
**AN** Document BON0000020220823ei8n002e5

**CLM** Barron's Cover - Main

**HD** **Recession Is Already Reality for Many in the U.S. --- Despite the market bounce driven by the release of federal oil reserves, small businesses and households are straining under the pressure of still-high inflation, an unbalanced labor market, and dwindling savings.**

**BY** By Lisa Beilfuss

**WC** 2,428 words

**PD** 22 August 2022

**SN** Barron's

**SC** B

**PG** 20

**LA** English

**CY** Copyright 2022 Dow Jones & Company, Inc. All Rights Reserved.

**LP**

When central bankers and economists gather in Jackson Hole, Wyo., this coming week to debate the trajectories of inflation and monetary policy, there will be hopeful talk of peak prices and renewed discussion of softish landings. They will be missing the point.

For small businesses and households across America, recession isn't an abstract concept or technical definition. It is a reality that many say they have felt since the start of this year, as rapidly rising prices ate into consumers' budgets, hit firms' profit margins, and pushed the cost of credit higher. Recently, the pain has lessened. A slowdown in major inflation gauges alongside an indication of robust hiring have investors betting anew on a "Goldilocks economy" that gently falls back into balance and allows for the Federal Reserve to stop tightening sooner than previously expected.

**IN** icnp : Consumer Goods

**NS** ecat : Economic News | ccat : Corporate/Industrial News | csmlbs : Small/Medium Businesses | e11 : Economic Performance/Indicators | e12 : Monetary Policy | ncolu : Columns | npag : Page One Stories | npred : Economic Predictions/Forecasts | c151 : Earnings | e1103 : Inflation Figures/Price Indices | c15 : Financial Performance | ncat : Content Types | nfact : Factiva Filters | nfcpx : C&E Executive News Filter | nfcpin : C&E Industry News Filter

**RE** usa : United States | uswy : Wyoming | namz : North America | usfl : Florida | uss : Southern U.S. | usw : Western U.S.

**IPD** Barrons.com

**IPC** BBBY

**PUB** Dow Jones & Company, Inc.

**AN** Document B000000020220819ei8m000gq

**CLM** Best Practices  
**SE** Advisor Center  
**HD** **Merrill Lynch's Aleeza Singh: When Dad Is Your Business Partner**

**BY** By Steve Garmhausen

**WC** 2,364 words

**PD** 19 August 2022

**ET** 20:45

**SN** Barron's Online

**SC** BON

**LA** English

**CY** Copyright 2022 Dow Jones & Company, Inc. All Rights Reserved.

**LP**

Aleeza Singh knows she has an advantage in pursuing her wealth management career: The Merrill Lynch advisor was mentored from childhood by her father, Tony Singh, who brought her onto his team and eventually plans to transfer the business to her. But she's still had to work hard to earn her position. "His philosophy has always been that I don't get anything; I have to earn it," says Singh, a partner and senior financial advisor in Merrill's Singh Group, in Davenport, Iowa.

Speaking with Barron's Advisor, the 33-year-old recounts how her plans to pursue a medical career changed when her father, a self-made immigrant from what's now Pakistan, made her an offer she couldn't refuse. She explains how having a multigenerational team translates to multigeneration clients. And she reveals the rather risky hobbies that help her unwind.

**CO** merly : Merrill | ncnbco : Bank of America Corporation

**IN** i814 : Banking | i83101 : Investment Banking | ibnk : Banking/Credit | ifinal : Financial Services | iinv : Investing/Securities | iwealth : Private Banking/Wealth Management | i831 : Financial Investment Services

**NS** ccat : Corporate/Industrial News | ncolu : Columns | ncat : Content Types

**RE** usa : United States | namz : North America

**IPD** Advisor Q&A

**IPC** I/AMG

**PUB** Dow Jones & Company, Inc.

**AN** Document BON0000020220819ei8j001e1



**SE** Barrons Magazine  
**HD** **China Stocks Are No Longer a Sure Thing. Where to Invest Now.**  
**BY** By Reshma Kapadia  
**WC** 2,020 words  
**PD** 19 August 2022  
**ET** 12:00  
**SN** Barron's Online  
**SC** BON  
**LA** English  
**CY** Copyright 2022 Dow Jones & Company, Inc. All Rights Reserved.

**LP**

For decades, China has been synonymous with fast growth. Multinational companies invested billions in supply chains and production hubs, and catered to the millions of Chinese who climbed out of poverty into a growing middle class. Investors reaped robust returns.

No longer.

**NS** m11 : Equity Markets | npag : Page One Stories | ccat : Corporate/Industrial News | mcat : Commodity/Financial Market News | ncat : Content Types | nfact : Factiva Filters | nfce : C&E Exclusion Filter

**RE** china : China | easiaz : Eastern Asia | chinaz : Greater China | asiaz : Asia | apacz : Asia Pacific | bric : BRICS Countries | devgcoz : Emerging Market Countries | dvpcoz : Developing Economies

**IPD** Feature

**IPC** 0386.HK

**PUB** Dow Jones & Company, Inc.

**AN** Document BON0000020220819ei8j0002t

**CLM** Barron's Cover - Main

**HD** **The Future of Renewable Energy Has Just Arrived --- The U.S. climate bill, along with a parallel initiative in Europe, could reshape global energy within this decade. How to play it.**

**BY** By Avi Salzman

**WC** 2,285 words

**PD** 15 August 2022

**SN** Barron's

**SC** B

**PG** 14

**LA** English

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**LP**

As a rule, energy transitions don't happen quickly. It took some 200 years for coal to supplant wood as the world's leading source of energy. The rise of oil wasn't that much faster. After the first oil rush, in Pennsylvania in 1859, more than a century passed before crude topped coal. The age of renewable energy, by comparison, is coming on with lightning speed.

Sources of energy like solar panels that seemed like anachronistic tree-hugger technology less than a decade ago have become key parts of baseload electricity generation. Wind turbines now produce more power in the U.S. than the entire country used in 1950. Electric vehicles account for 5% of new-car sales, a tipping point that in other countries has led to 25% adoption within four years. Renewables are now the largest source of power generation in Europe, and they expanded their share of global power generation to 29% in 2020 from 20% in 2010.

**CO** rweeg : REC Silicon ASA

**IN** i163 : Renewable Energy Generation | i1 : Energy | i16 : Electricity/Gas Utilities | i16101 : Electric Power Generation | i35101 : Passenger Cars | i35104 : Alternative Fuel Vehicles | iaut : Automotive | iindele : Industrial Electronics | iindstrls : Industrial Goods | itech : Technology | iutil : Utilities | iwind : Wind Energy | i351 : Motor Vehicles | ieutil : Electric Utilities

**NS** ncolu : Columns | npag : Page One Stories | reqren : Suggested Reading Energy | ncat : Content Types | redit : Selection of Top Stories/Trends/Analysis | reqr : Suggested Reading Industry News

**RE** usa : United States | namz : North America | eurz : Europe

**IPD** Barrons.com

**IPC** 066570.SE

**PUB** Dow Jones & Company, Inc.

**AN** Document B000000020220812ei8f000gp

**HD** Finally, Weight-Loss Drugs That Work --- New injectable drugs from Eli Lilly and Novo Nordisk can help people safely shed as much as 20% of their weight. If health insurers get behind them, the drugs could be the blockbusters of the decade. Handicapping the stocks.

**BY** By Bill Alpert

**WC** 2,516 words

**PD** 15 August 2022

**SN** Barron's

**SC** B

**PG** 18

**LA** English

**CY** Copyright 2022 Dow Jones & Company, Inc. All Rights Reserved.

**LP**

This is not a typical weight-loss story.

After all of the diet, supplement, and workout fads we've endured, we're about to have drugs that are safe and effective. They're our best hope yet for stemming the obesity epidemic that threatens the lives of 100 million Americans and half a billion people worldwide.

**CO** lilye : Eli Lilly and Co | novo : Novo Nordisk A/S

**IN** i257 : Pharmaceuticals | i82 : Insurance | i8200301 : Health/Medical Insurance | i951 : Healthcare/Life Sciences | ibcs : Business/Consumer Services | ibssv : Business Support Services | iinsulin : Diabetes Drugs | iphddd : Drug Discovery/Development | iphph : Healthcare Provision | i82003 : Non-life Insurance | i8395414 : Scientific Research Services | idrugty : Specialized Drugs/Medications | ifinal : Financial Services | ihormp : Hormone Products | imedres : Medical Research Services | iphhss : Healthcare Support Services | iphlab : Diagnostic/Medical Research Services

**NS** gdias : Diabetes | gfod : Food/Drink | ghea : Health | glife : Living/Lifestyle | gnutr : Nutrition | gobes : Obesity | gwelss : Weight Management | npag : Page One Stories | gcat : Political/General News | gcom : Society/Community | gfitn : Physical/Mental Fitness | gmed : Medical Conditions | gsoc : Social Issues | ncat : Content Types

**RE** namz : North America | usa : United States

**IPD** Barrons.com

**IPC** ABBV

**PUB** Dow Jones & Company, Inc.

**AN** Document B000000020220812ei8f0005l



**CLM** Best Practices  
**SE** Advisor Center  
**HD** **Podcast: Great COOs Need to Be 'Brutally Honest'**  
**BY** By Greg Bartalos  
**WC** 4,340 words  
**PD** 9 August 2022  
**ET** 22:37  
**SN** Barron's Online  
**SC** BON  
**LA** English  
**CY** Copyright 2022 Dow Jones & Company, Inc. All Rights Reserved.

**LP**

In 2001, Allison Felix joined Cassaday & Company as executive assistant to the president and CEO. Five years later she became director of business management and in 2011 she was promoted to chief operating officer. Today, Felix is COO and managing partner, tasked with helping the McLean, Va.-based firm scale operations and achieve its strategic vision.

Founded in 1993, Cassaday has roughly 80 employees, serves 2,700 households, and has \$4.3 billion in assets under management. In December 2021, Cassaday joined [Focus Financial Partners](#)' (ticker: FOCS) [network](#).

**CO** focfpl : Focus Financial Partners, LLC  
**IN** i814 : Banking | ibnk : Banking/Credit | ifinal : Financial Services | iinv : Investing/Securities | iwealth : Private Banking/Wealth Management | i831 : Financial Investment Services  
**NS** c41 : Management | c411 : Management Moves | ccat : Corporate/Industrial News | csimc : Senior Level Management | ncolu : Columns | nimage : Images | ncat : Content Types | nfact : Factiva Filters | nfcpx : C&E Executive News Filter | nfcpi : C&E Industry News Filter  
**IPD** Advisor News  
**IPC** I/AMG  
**PUB** Dow Jones & Company, Inc.  
**AN** Document BON0000020220809ei89002p9

<b>CLM</b>	Barron's Cover - Main
<b>HD</b>	<b>GE's Brave New Life --- After decades of decline, the industrial icon is splitting into three separate companies. Those businesses, and their stocks, could perform nicely.</b>
<b>BY</b>	By Al Root
<b>WC</b>	2,385 words
<b>PD</b>	8 August 2022
<b>SN</b>	Barron's
<b>SC</b>	B
<b>PG</b>	16
<b>LA</b>	English
<b>CY</b>	Copyright 2022 Dow Jones & Company, Inc. All Rights Reserved.
<b>LP</b>	<p>So, it comes to this—General Electric, once arguably the greatest of American companies, will cease to exist, at least as the industrial titan it once was.</p> <p>After more than 20 years of decline, the company is entering the final stages of a process that has seen the General Electric of old slowly dismantled—the corporate powerhouse founded by Thomas Edison doesn't even make lightbulbs anymore—until just three parts remain. Soon, those units—GE's aviation, energy, and healthcare businesses—will be separated into individual companies, starting with GE Healthcare, which could be spun off in early 2023. It's a sad end for a giant humbled by missteps.</p>
<b>CO</b>	gemeds : GE Healthcare Limited   gecapt : General Electric Capital Corporation   gnelc : General Electric Company
<b>IN</b>	i257 : Pharmaceuticals   i814 : Banking   i8150105 : Consumer Lending   i8396 : Diversified Holding Companies   i951 : Healthcare/Life Sciences   iaer : Aerospace/Defense   ibcs : Business/Consumer Services   ifinal : Financial Services   iindstrls : Industrial Goods   iphmed : Medical Devices/Apparatus   ibnk : Banking/Credit   i372 : Medical Equipment/Supplies   i81501 : Credit Types/Services   i8150104 : Sales Financing   itheradv : Diagnostic/Therapeutic Devices
<b>NS</b>	cncc : New Companies Creation   ccat : Corporate/Industrial News   c151 : Earnings   c181 : Acquisitions/Mergers/Shareholdings   cacqu : Acquisitions/Mergers   cactio : Corporate Actions   ncolu : Columns   npag : Page One Stories   reqbcs : Suggested Reading Business/Consumer Services   reqrbc : Suggested Reading Banking/Credit   c02 : Corporate Changes   c11 : Corporate Strategy/Planning   c15 : Financial Performance   c18 : Ownership Changes   ncat : Content Types   nfact : Factiva Filters   nfcpin : C&E Industry News Filter   redit : Selection of Top Stories/Trends/Analysis   reqr : Suggested Reading Industry News
<b>IPD</b>	Barrons.com
<b>IPC</b>	7011.TO
<b>PUB</b>	Dow Jones & Company, Inc.
<b>AN</b>	Document B000000020220805ei880008d

**CLM** Best Practices  
**SE** Advisor Center  
**HD** **Michael LaMena: How Wealthspire Plans to Keep Its Hot Growth Sizzling**  
**BY** By Steve Garmhausen  
**WC** 2,414 words  
**PD** 5 August 2022  
**ET** 21:50  
**SN** Barron's Online  
**SC** BON  
**LA** English  
**CY** Copyright 2022 Dow Jones & Company, Inc. All Rights Reserved.  
**LP**

Wealthspire Advisors has doubled in size, to \$20 billion, since its founding three years ago, and the law of large numbers dictates that repeating this feat will be difficult. But it certainly bodes well that the acquisition-minded RIA business is backed by NFP, an insurance and consulting firm with \$1.9 billion of annual revenue.

"I look at what we were able to do the past three years in doubling the size of the business," says Michael LaMena, CEO of New York-based Wealthspire. "If we could do that again in the next three to four years, I'd be ecstatic." In an interview with Barron's Advisor, LaMena talks growth strategy, Wealthspire's big differentiator in a crowded field of acquirers, and what it's like running a fiduciary advice firm that's wholly owned by an insurance brokerage.

**IN** i82 : Insurance | i832 : Insurance Brokering | ifinal : Financial Services  
**NS** ccat : Corporate/Industrial News | ncolu : Columns | niex : Interviews with Corporate Executives | ncat : Content Types | nfact : Factiva Filters | nfcpx : C&E Executive News Filter | nitv : Interviews  
**RE** usa : United States | namz : North America  
**IPD** Advisor Q&A  
**IPC** I/INB  
**PUB** Dow Jones & Company, Inc.  
**AN** Document BON0000020220805ei85002jp

**SE** Daily  
**HD** **New Buyback Tax Will Force Companies to Think Twice on How to Use Cash**  
**WC** 2,029 words  
**PD** 5 August 2022  
**ET** 16:14  
**SN** Barron's Online  
**SC** BON  
**LA** English  
**CY** Copyright 2022 Dow Jones & Company, Inc. All Rights Reserved.

**LP**

In the scrap over how to fund President Joe Biden's spending plans, the Democrats' focus has shifted from taxing private funds to public at the [last minute](#).

Sen. Kyrsten Sinema (D., Ariz.) backs dropping a proposed tax increase on carried interest income and adding a 1% tax on stock buybacks to the legislation.

**CO** vglctl : Virgin Galactic LLC | virgin : Virgin Group Limited

**IN** i3302 : Computers/Consumer Electronics | i330202 : Software | i75 : Airlines | ibnk : Banking/Credit | icph : Computer Hardware | iint : Online Service Providers | iinv : Investing/Securities | itsp : Transportation/Logistics | iairtr : Air Transport | icomp : Computing | ifinal : Financial Services | itech : Technology | i751 : Space Transport

**NS** cshbuy : Share Buybacks/Redemptions | c1511 : Annual/Shareholder/Board Meetings | c171 : Share Capital | c181 : Acquisitions/Mergers/Shareholdings | c41 : Management | cactio : Corporate Actions | ccat : Corporate/Industrial News | c17 : Corporate Funding | c18 : Ownership Changes | ncat : Content Types | nfact : Factiva Filters | nfcpin : C&E Industry News Filter

**RE** usa : United States | namz : North America

**IPD** The Barron's Daily

**IPC** 6758.TO

**PUB** Dow Jones & Company, Inc.

**AN** Document BON0000020220805ei85000ul

**SE** Barrons Magazine  
**HD** **The Best Annuities for Income and Growth**  
**BY** By Karen Hube  
**WC** 2,753 words  
**PD** 4 August 2022  
**ET** 21:11  
**SN** Barron's Online  
**SC** BON  
**LA** English  
**CY** Copyright 2022 Dow Jones & Company, Inc. All Rights Reserved.  
**LP**

These are boom times for annuities, which are providing retirement savers and investors with not only their hallmark stability during what has been a dismal year for both stocks and bonds, but also the richest benefits in more than a decade and, in some cases, the promise of major upside when stocks rebound.

Sales of these hybrid insurance-investment products have surged this year—as has historically been the case in down markets and rising interest-rate environments—because their principal protection and high yields relative to other low-risk investment options make them attractive fixed-income replacements. Consider a current 4.05% three-year guaranteed fixed-rate annuity paid by Midland National Life Insurance, compared with 2.9% for a three-year certificate of deposit or the current 3.22% yield on a three-year Treasury.

**CO** mnlic : Midland National Life Insurance Company | samse : Sammons Enterprises Inc  
**IN** i82 : Insurance | i82002 : Life Insurance | iannui : Annuities | ibnk : Banking/Credit | ifinal : Financial Services | iinv : Investing/Securities | i81502 : Trusts/Funds/Financial Vehicles  
**NS** m11 : Equity Markets | mcat : Commodity/Financial Market News | gretir : Retirement Planning | c1513 : Sales Figures | ccat : Corporate/Industrial News | gpersf : Personal Finance | ncor : Corrections | ncrx : Corrected Items | npag : Page One Stories | c15 : Financial Performance | c151 : Earnings | gcat : Political/General News | ncat : Content Types | nfact : Factiva Filters | nfce : C&E Exclusion Filter | nfcpin : C&E Industry News Filter  
**IPD** Best Annuities  
**IPC** CUNA.XX  
**PUB** Dow Jones & Company, Inc.  
**AN** Document BON0000020220804ei84002jp

**SE** Daily  
**HD** **China's Retaliation to Pelosi's Trip Keeps Chips Off the Menu for Now**  
**WC** 2,049 words  
**PD** 3 August 2022  
**ET** 16:30  
**SN** Barron's Online  
**SC** BON  
**LA** English  
**CY** Copyright 2022 Dow Jones & Company, Inc. All Rights Reserved.  
**LP**  
 China's fresh blockade of food imports from Taiwan wasn't enough to further destabilize markets nervous about House Speaker Nancy Pelosi's historic visit to the island.  
 Beijing's four days of military drills in the waters surrounding Taiwan, beginning Thursday after Pelosi's departure, could be, however.  
**CO** taisem : Taiwan Semiconductor Manufacturing Company Limited | opexpc : Organization of the Petroleum Exporting Countries  
**IN** icph : Computer Hardware | i3302 : Computers/Consumer Electronics | i34531 : Semiconductors | i66 : Lodgings/Restaurants/Bars | icnp : Consumer Goods | ifurn : Furniture | iindele : Industrial Electronics | iindstrls : Industrial Goods | iint : Online Service Providers | ilea : Leisure/Arts/Hospitality | itech : Technology | itourm : Tourism | itsp : Transportation/Logistics | icomp : Computing  
**NS** credun : Lay-offs/Redundancies | c42 : Labor/Personnel | ccat : Corporate/Industrial News | ncat : Content Types | nfact : Factiva Filters | nfcpin : C&E Industry News Filter  
**RE** taiwan : Taiwan | china : China | asiaz : Asia | easiaz : Eastern Asia | usa : United States | apacz : Asia Pacific | bric : BRICS Countries | chinaz : Greater China | devgcoz : Emerging Market Countries | dvpcoz : Developing Economies | namz : North America  
**IPD** The Barron's Daily  
**IPC** 2330.TW  
**PUB** Dow Jones & Company, Inc.  
**AN** Document BON0000020220803ei83000rt

**CLM** Barron's Cover - Main  
**HD** **solving the food crisis**  
**BY** By Reshma Kapadia and Al Root  
**WC** 2,357 words  
**PD** 1 August 2022  
**SN** Barron's  
**SC** B  
**PG** 14  
**LA** English  
**CY** Copyright 2022 Dow Jones & Company, Inc. All Rights Reserved.  
**LP**

Scorching heat and drought shriveling up crops in the Midwest and eastern Africa. A continued pandemic. War in Ukraine. Rarely has the world seen such a confluence of disasters, threatening the ability of [nations to feed the hungry](#), this year and beyond.

Food prices were rising even before the war in Ukraine, hurt by pandemic-related disruptions on top of devastation from more frequent and severe weather catastrophes. Nearly one in three people worldwide—or 2.3 billion people—didn't have access to adequate food in 2021, up 350 million from prepandemic levels, according to the United Nations. An estimated 702 million to 828 million people in the world faced hunger, up 150 million from pre-Covid levels.

**IN** itsp : Transportation/Logistics

**NS** gfdsec : Food/Drinking Water Security | gvio : Military Action | gntdis : Natural Disasters/Catastrophes | gwelf : Welfare/Social Services | ncolu : Columns | ncor : Corrections | ncrx : Corrected Items | npag : Page One Stories | c151 : Earnings | c15 : Financial Performance | ccat : Corporate/Industrial News | gcat : Political/General News | gcns : National/Public Security | gcom : Society/Community | gdis : Disasters/Accidents | grisk : Risk News | ncat : Content Types | nfact : Factiva Filters | nfcpin : C&E Industry News Filter

**RE** ukrn : Ukraine | russ : Russia | usa : United States | asiaz : Asia | easiaz : Eastern Asia | eurz : Europe | namz : North America | uk : United Kingdom | ussrz : CIS Countries | apacz : Asia Pacific | bric : BRICS Countries | devgcoz : Emerging Market Countries | dvpcoz : Developing Economies | eeurz : Central/Eastern Europe | weurz : Western Europe

**IPD** Barrons.com

**IPC** BAC

**PUB** Dow Jones & Company, Inc.

**AN** Document B000000020220729ei810002t

**CLM** Best Practices  
**SE** Advisor Center  
**HD** **Rudy Adolf: Focus Financial Partners Can Hit \$1 Trillion**  
**BY** By Steve Garmhausen  
**WC** 2,076 words  
**PD** 29 July 2022  
**ET** 20:50  
**SN** Barron's Online  
**SC** BON  
**LA** English  
**CY** Copyright 2022 Dow Jones & Company, Inc. All Rights Reserved.

**LP**

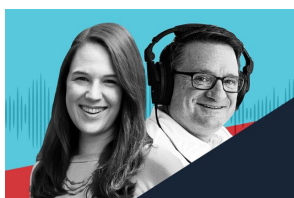
Shares of Focus Financial Partners debuted at \$35 in 2018, hit \$17 two years later, and shot to \$68 last November before falling to a recent price of, you guessed it, about \$35. But CEO Rudy Adolph professes not to be worried. "You're not going to talk to a single CEO of just about any business right now who is happy where they are trading," says Adolf, who co-founded Focus in 2006 and took it public in 2018. "But things go up, things go down; what's important is how you manage your business."

**CO** cifma : CI Financial Corp. | focfpl : Focus Financial Partners, LLC  
**IN** i814 : Banking | ibnk : Banking/Credit | ifinal : Financial Services | iinv : Investing/Securities | iwealth : Private Banking/Wealth Management | i831 : Financial Investment Services | i83107 : Portfolio/Fund/Asset Management  
**NS** c151 : Earnings | c41 : Management | ccat : Corporate/Industrial News | csImc : Senior Level Management | ncolu : Columns | c15 : Financial Performance | ncat : Content Types | nfact : Factiva Filters | nfcpin : C&E Industry News Filter  
**RE** usa : United States | namz : North America  
**IPD** Advisor Q&A  
**IPC** CIX.T  
**PUB** Dow Jones & Company, Inc.  
**AN** Document BON0000020220729ei7t0025t



CLM Best Practices  
 SE Advisor Center  
 HD **How One RIA Created a Path for Next-Gen Talent to Become Partners**  
 BY By Greg Bartalos  
 WC 6,134 words  
 PD 26 July 2022  
 ET 23:30  
 SN Barron's Online  
 SC BON  
 LA English  
 CY Copyright 2022 Dow Jones & Company, Inc. All Rights Reserved.  
 LP

Creativity and a dedication to nurturing talent are central to Monument Wealth Management's core principles. "We always envisioned having a firm that would endure through having next-generation leaders come along," says David B. Armstrong, president and co-founder, on The Way Forward podcast.



IN iwealth : Private Banking/Wealth Management | i814 : Banking | i831 : Financial Investment Services | ibnk : Banking/Credit | ifinal : Financial Services | iinv : Investing/Securities  
 NS ccat : Corporate/Industrial News | ncolu : Columns | nimage : Images | ncat : Content Types  
 IPD Advisor News  
 IPC N/CNW  
 PUB Dow Jones & Company, Inc.  
 AN Document BON0000020220726ei7q002xl

<b>CLM</b>	Barron's Cover - Main
<b>HD</b>	<b>Amazon Is Ready To Rise Again --- Amazon's recent struggles in e-commerce are masking its continued dominance in the cloud. For investors, it's time to refocus. Amazon shares have never looked more attractive than they do right now.</b>
<b>BY</b>	By Eric J. Savitz
<b>WC</b>	2,523 words
<b>PD</b>	25 July 2022
<b>SN</b>	Barron's
<b>SC</b>	B
<b>PG</b>	24
<b>LA</b>	English
<b>CY</b>	Copyright 2022 Dow Jones & Company, Inc. All Rights Reserved.
<b>LP</b>	<p>Amazon.com has reported earnings about 100 times since it went public in 1997. Every one of those quarterly reports has shown a growing company, despite plenty of ups and downs in the economy—and the internet. Amazon's worst quarter came in September 2001, when the internet bubble was blowing apart. Even then, revenue grew slightly from a year earlier. Now, though, Amazon's streak may be coming to an end.</p> <p>When Amazon (ticker: AMZN) reports second-quarter earnings on July 28, Wall Street analysts expect revenue growth of just 5%. That's a tepid number by Amazon standards, and if things are just slightly worse than expected, revenue could actually decline. It would be a telling moment, with Amazon facing its greatest set of challenges since founder Jeff Bezos began selling books out of his house almost 30 years ago.</p>
<b>CO</b>	amzcom : Amazon.com, Inc.   zxamaz : Amazon Web Services, Inc.
<b>IN</b>	i3302 : Computers/Consumer Electronics   i64 : Retail/Wholesale   i656000301 : Etailing   i8394 : Computer Services   iappsp : Cloud Computing   ibcs : Business/Consumer Services   icph : Computer Hardware   iecom : E-commerce   iint : Online Service Providers   iretail : Retail   itech : Technology   icomp : Computing   idserv : Data Services
<b>NS</b>	ccat : Corporate/Industrial News   c15 : Financial Performance   c151 : Earnings   c1522 : Share Price Movement/Disruptions   ncolu : Columns   npag : Page One Stories   reqbcs : Suggested Reading Business/Consumer Services   reqrre : Suggested Reading Retail   ncat : Content Types   nfact : Factiva Filters   nfce : C&E Exclusion Filter   nfcpin : C&E Industry News Filter   redit : Selection of Top Stories/Trends/Analysis   reqr : Suggested Reading Industry News
<b>IPD</b>	Barrons.com
<b>IPC</b>	2222.SA
<b>PUB</b>	Dow Jones & Company, Inc.
<b>AN</b>	Document B000000020220722ei7p00003

**SE** Advisor Center  
**HD** **Thinking of Moving to Canada? This Financial Pro Has Some Advice.**  
**BY** By Ross Snel  
**WC** 2,058 words  
**PD** 22 July 2022  
**ET** 20:42  
**SN** Barron's Online  
**SC** BON  
**LA** English  
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**LP**

Americans mulling a move to Canada might think the financial transition would be a piece of cake. After all, both countries are democracies with advanced banking systems. What could go wrong? Actually, a whole lot, explains Darren Coleman, a Raymond James advisor who has developed a specialty counseling cross-border clients. "We have two very different tax regimes," he says. "We have two very different compliance regimes. And what often surprises people is just how different they are."

In an interview with Barron's Advisor, Coleman, a Certified Financial Planner who leads a Toronto-based team of seven, details the pitfalls that can trip up Americans in Canada—from frozen IRAs to having to "Canadianize" brokerage statements to getting hit with tax bills on municipal bonds and Roth IRAs.

**NS** e211 : Government Budget/Taxation | e213 : Sub-National/Local Budget/Taxation | ecat : Economic News | gretir : Retirement Planning | gira : Individual Retirement Accounts | e21 : Government Finance | gcat : Political/General News | gpersf : Personal Finance  
**RE** cana : Canada | namz : North America | usa : United States  
**IPD** Advisor Q&A  
**IPC** N/GEN  
**PUB** Dow Jones & Company, Inc.  
**AN** Document BON0000020220722ei7m001xh



**CLM** Barron's Cover - Main

**HD** **Finding Silver Linings in the Market's Fall --- After a punishing first half for stocks and bonds, our Roundtable panelists see plenty of bargains—and brighter days coming. 42 investment picks**

**BY** By Lauren R. Rublin

**WC** 10,239 words

**PD** 18 July 2022

**SN** Barron's

**SC** B

**PG** 17

**LA** English

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**LP**

To everything there is a season: A time to hide in a bunker with a crash helmet on as stock and bond prices plummet, and a time to wade cautiously into the market in search of newly created bargains.

If you've been reading the Barron's Roundtable for a few years, or even decades, you already know what our panelists are doing. And if you're new to the proceedings, you can probably guess. With stocks down 20% this year—and in many cases, much more—these investment pros are busily buying companies with durable franchises, wide moats, strong balance sheets, abundant cash flows, and share prices far below what they think the businesses are worth.

**IN** ibnk : Banking/Credit | icnp : Consumer Goods | ifurn : Furniture | iinv : Investing/Securities | iretail : Retail | itsp : Transportation/Logistics | i64 : Retail/Wholesale | ifinal : Financial Services

**NS** mbnkr : Bunker Fuel Markets | c151 : Earnings | ccat : Corporate/Industrial News | ciprof : Industry Profiles | gvbod : Government Bodies | mcat : Commodity/Financial Market News | ncolu : Columns | npag : Page One Stories | c15 : Financial Performance | cdom : Markets/Marketing | gcat : Political/General News | gpir : Politics/International Relations | gpol : Domestic Politics | m14 : Commodity Markets | m143 : Energy Markets | mcrntg : Crude Oil/Natural Gas Product Markets | ncat : Content Types | nfact : Factiva Filters | nfce : C&E Exclusion Filter | nfcpin : C&E Industry News Filter

**RE** namz : North America | uk : United Kingdom | usa : United States | eurz : Europe | weurz : Western Europe

**IPD** Barrons.com

**IPC** 051910.SE

**PUB** Dow Jones & Company, Inc.

**AN** Document B000000020220715ei7i000p1

**CLM** Best Practices  
**SE** Advisor Center  
**HD** **Nelrae Pasha Ali: How Being an All-American Athlete Prepared Me for Finance**  
**BY** By Steve Garmhausen  
**WC** 2,181 words  
**PD** 15 July 2022  
**ET** 19:15  
**SN** Barron's Online  
**SC** BON  
**LA** English  
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**LP**

Nelrae Pasha Ali, a Wells Fargo advisor in Jacksonville, Fla., often calls clients on rough days in the stock market, as much to reassure them as to inform them it's time to take action. "Hey, you know that uncomfortable feeling you're feeling?" she tells clients. "That's the buying opportunity."

In a wide-ranging conversation with Barron's Advisor, Ali explains how her background as a standout athlete—she's a six-time NCAA All American in track and field, and won a bronze medal in the 1995 World Indoor Championships—prepared her for a career in wealth management. The head of a \$275 million-asset practice also explains why she's on a mission to meet with each of her clients before the end of the summer.

**NS** ncolu : Columns | nitv : Interviews | ncat : Content Types | nfact : Factiva Filters | nfcpx : C&E Executive News Filter  
**RE** usga : Georgia (US) | namz : North America | usa : United States | uss : Southern U.S.  
**IPD** Advisor Q&A  
**IPC** N/SPO  
**PUB** Dow Jones & Company, Inc.  
**AN** Document BON0000020220715ei7f001b9

**CLM** Best Practices  
**SE** Advisor Center  
**HD** **Why Finding Young Workers Is Easy for This RIA**  
**BY** By Greg Bartalos  
**WC** 5,106 words  
**PD** 13 July 2022  
**ET** 00:53  
**SN** Barron's Online  
**SC** BON  
**LA** English  
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**LP**

As Kevin Myeroff explains it, many of his peers gripe about how difficult it is to find young talent and yet they refuse to pay up for it. "We created an apprenticeship that lasts for five years" that also "paid a working wage," says the principal and senior strategic advisor of Akron, Ohio-based [Sequoia Financial Group](#), a Barron's-ranked top RIA firm. "We had to do it a different way because the traditional way was not working."

While internships are often seen as a way to offload work on "cheap labor," Myeroff, a Barron's-ranked independent advisor, and Elizabeth Scheiderer, a senior financial advisor, say the opposite occurs in their program. "For us, when the interns come in, our life gets harder, not easier," he says. "It takes a lot of effort to create that enriching experience."

**CO** commnz : Sequoia Financial Group Ltd  
**IN** ibnk : Banking/Credit | ifinal : Financial Services | iinv : Investing/Securities | iwealth : Private Banking/Wealth Management | i814 : Banking | i831 : Financial Investment Services | i83108 : Investment Advice/Research Services  
**NS** cemtpd : Employee Training/Development | c42 : Labor/Personnel | ccat : Corporate/Industrial News | crect : Recruitment | ncolu : Columns | nimage : Images | ncat : Content Types | nfact : Factiva Filters | nfcpin : C&E Industry News Filter  
**IPD** Advisor News  
**IPC** I/AMG  
**PUB** Dow Jones & Company, Inc.  
**AN** Document BON0000020220712ei7c003bi

**CLM** Barron's MFQ  
**SE** Mutual\_Funds  
**HD** **Active Funds Are On Top Again. Can It Last? --- The steep downturn in the stock market in 2022 has given active fund managers a new lease on life, with many finding ways to grab the best slices of the market**  
**BY** By Karen Hube  
**WC** 2,594 words  
**PD** 11 July 2022  
**SN** Barron's  
**SC** B  
**PG** L2  
**LA** English  
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**LP**  
 Stockpickers are finally earning their fees once again.  
 After more than a decade of chronic underperformance, actively managed stock mutual funds and exchange-traded funds [have been beating their passive peers](#) at a steadily rising rate during the stock market's selloff this year.  
**IN** i81502 : Trusts/Funds/Financial Vehicles | i8150211 : Mutual Funds | ibnk : Banking/Credit | iinv : Investing/Securities | ifinal : Financial Services  
**NS** m16 : Fund Markets | gpersi : Personal Investments | mcat : Commodity/Financial Market News | ncolu : Columns | ncor : Corrections | ncrx : Corrected Items | c151 : Earnings | c15 : Financial Performance | ccat : Corporate/Industrial News | gcat : Political/General News | gpersf : Personal Finance | ncat : Content Types | nfact : Factiva Filters | nfce : C&E Exclusion Filter | nfcpin : C&E Industry News Filter  
**RE** namz : North America | usa : United States  
**IPD** Barrons.com  
**IPC** AAPL  
**PUB** Dow Jones & Company, Inc.  
**AN** Document B000000020220708ei7b0002t



**CLM** Best Practices  
**SE** Advisor Center  
**HD** **Best of Barron's Advisor Q&A: Is 60/40 Dead? And Can the Fed Avoid a Recession?**  
**BY** By Steve Garmhausen  
**WC** 2,237 words  
**PD** 8 July 2022  
**ET** 21:15  
**SN** Barron's Online  
**SC** BON  
**LA** English  
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**LP**

Since starting our weekly Q&A column in 2018, Barron's Advisor has had the privilege of getting to know many of the most successful people in the industry in depth. We've learned about not just their views on the market, but how they built their careers and their businesses, and who they are as people. In just the past few weeks, our interview subjects have shared their perspective on this year's messy markets and the potential for recession, as well as stories of navigating the industry as members of minority groups and of dealing with personal tragedy. We thought we'd share excerpts of recent interviews during this holiday-shortened week. Our hope is that in this column you'll find food for thought, perspective on the business, and perhaps a bit of inspiration.

**NS** ecat : Economic News | glgbt : LGBT Rights | ncolu : Columns | gcat : Political/General News | gcom : Society/Community | ghum : Human Rights/Civil Liberties | ncat : Content Types  
**IPD** Advisor Q&A  
**IPC** N/GEN  
**PUB** Dow Jones & Company, Inc.  
**AN** Document BON0000020220708ei78002gx





**CLM** Barron's Cover - Main  
**HD** **Yields Are Above 8%. It's Time to Get Excited About Income Investing**  
**BY** By Andrew Bary  
**WC** 2,985 words  
**PD** 4 July 2022  
**SN** Barron's  
**SC** B  
**PG** 16  
**LA** English  
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**LP**

Income-oriented investors, it's time to celebrate. There are suddenly many more opportunities—in areas ranging from junk bonds to real estate investment trusts—after the bear markets in stocks and bonds in the first half of 2022.

In the bond market, yields in many cases have doubled, to around 8%, after one of the sharpest selloffs in history. This enhances the diversifying power of bonds in equity-heavy portfolios, and should [revive interest in the traditional 60/40 mix](#) of stocks and bonds.

**IN** i1 : Energy | i16 : Electricity/Gas Utilities | i25 : Chemicals | i8150211 : Mutual Funds | i82 : Insurance | ibnk : Banking/Credit | icnp : Consumer Goods | iinv : Investing/Securities | ilea : Leisure/Arts/Hospitality | i81502 : Trusts/Funds/Financial Vehicles | ibasicm : Basic Materials/Resources | ifinal : Financial Services | iutil : Utilities  
**NS** gpersi : Personal Investments | ncolu : Columns | npag : Page One Stories | reqren : Suggested Reading Energy | gcat : Political/General News | gpersf : Personal Finance | ncat : Content Types | redit : Selection of Top Stories/Trends/Analysis | reqr : Suggested Reading Industry News  
**RE** namz : North America | usa : United States  
**IPD** Barrons.com  
**IPC** 1198.KU  
**PUB** Dow Jones & Company, Inc.  
**AN** Document B000000020220702ei74000dx

**HD** **How Wall Street Invaded Crypto --- Products and trading practices that would never fly in the traditional financial industry have found a new home in the crypto universe. The crash now is partly a result of this unregulated and freewheeling enterprise, and the shakeout is far from finished.**

**BY** By Joe Light

**WC** 3,688 words

**PD** 4 July 2022

**SN** Barron's

**SC** B

**PG** 24

**LA** English

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**LP**

Cory Klippsten is a big fan of Bitcoin. But his affinity for cryptocurrencies ends there. Klippsten, head of a company called Swan Bitcoin, sees a growing minefield of scams, fraud, and risky products throughout the industry. As the market retreats, he sounds embarrassed to be associated with it.

"I'm a Bitcoiner who believes Bitcoin is transforming the world," says Klippsten, 44. "I'm so sick of having my name and business associated with the crypto industry. It's exhausting."

**CO** seexc : US Securities and Exchange Commission

**IN** ivicu : Virtual Currencies/Cryptocurrencies | i831 : Financial Investment Services | i8394 : Computer Services | iblock : Blockchain Technology | ifinal : Financial Services | itech : Technology | ibcs : Business/Consumer Services | ibnk : Banking/Credit | ifmsoft : Financial Technology | iinv : Investing/Securities

**NS** c12 : Corporate Crime/Legal Action | c173 : Financing Agreements | ccat : Corporate/Industrial News | ciprof : Industry Profile | ecat : Economic News | gcrim : Crime/Legal Action | gybod : Government Bodies | m14 : Commodity Markets | npag : Page One Stories | c17 : Corporate Funding | gcat : Political/General News | gpir : Politics/International Relations | gpol : Domestic Politics | mcat : Commodity/Financial Market News | ncat : Content Types | nfact : Factiva Filters | nfce : C&E Exclusion Filter | nfcpx : C&E Executive News Filter | nfcpin : C&E Industry News Filter

**RE** namz : North America | usa : United States

**IPD** Barrons.com

**IPC** C

**PUB** Dow Jones & Company, Inc.

**AN** Document B000000020220701ei740002w

**CLM** Best Practices  
**SE** Advisor Center  
**HD** **A Finra Arbitration Descended Into Acrimony. Fallout Lingers a Decade Later.**  
**BY** By Andrew Welsch  
**WC** 2,580 words  
**PD** 1 July 2022  
**ET** 11:00  
**SN** Barron's Online  
**SC** BON  
**LA** English  
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## LP

Finra, Wall Street's self regulator, is still being haunted by a decade-old blowup. In 2011 and 2012, the private organization dismissed three arbitrators after a brokerage industry attorney complained they were biased. The arbitrators were reinstated following an outcry from investor advocates and press coverage, but the attorney later referred to an "agreement" with Finra that he wouldn't have to work with those arbitrators again and successfully had one of them removed from a case involving Wells Fargo.

**CO** nwbc : Wells Fargo & Company  
**IN** i814 : Banking | ifinal : Financial Services | ibnk : Banking/Credit | i81402 : Commercial Banking  
**NS** c13 : Regulation/Government Policy | c131 : Regulatory Bodies | ccat : Corporate/Industrial News | ncolu : Columns | nimage : Images | ncat : Content Types | nfact : Factiva Filters | nfcpin : C&E Industry News Filter  
**IPD** Advisor News  
**IPC** GRT.XX  
**PUB** Dow Jones & Company, Inc.  
**AN** Document BON0000020220701ei7100001

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