

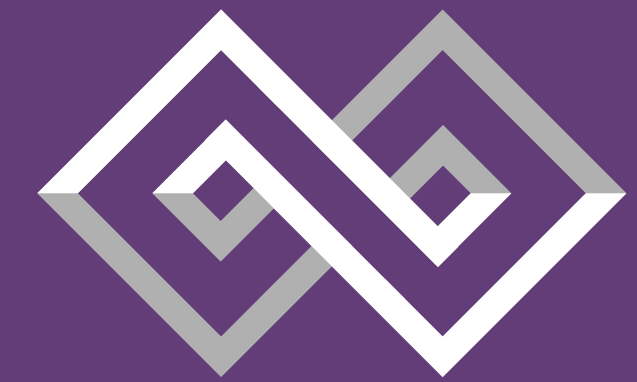


Z E P H Y R

# HOW TO (FINALLY) LAUNCH **A PODCAST FOR YOUR RIA**

---

PRESENTED BY: MICHAEL REYNOLDS

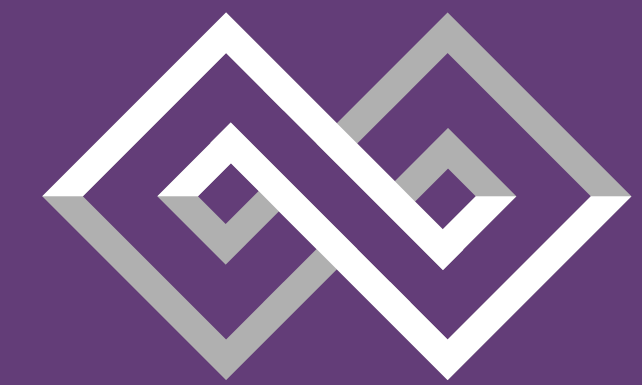


Z E P H Y R

## MICHAEL REYNOLDS

- Co-founder at Zephyr
- Cellist
- Sushi connoisseur
- Tennis/pickleball player
- Star Trek nerd
- RIA owner





Z E P H Y R

---

## BRITTANY NEAL

- Marketing Coordinator
- Website builder & marketer
- Human/dog mom
- Loves yoga and coffee

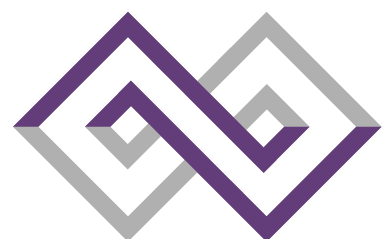


# What We Do

## SNAPPY WEBSITES AND TECH-FORWARD MARKETING FOR FEE-ONLY RIAs

You juggle a lot as an independent fee-only RIA. Investments, planning, client service, compliance, and more. And you need to reach new clients at the same time.

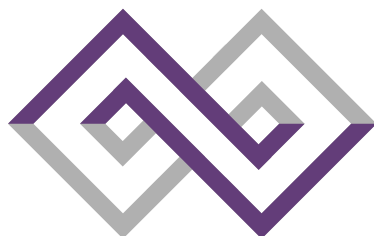
Don't let marketing bog you down. Get a clear plan, a beautiful website, and marketing support to help you scale your practice.


[LEARN MORE](#)[GET IN TOUCH](#)



# Background


- Career changer.
- Owned digital marketing agency for 23 years.
- Podcasting since 2014.
- Developed and maintained marketing show for three years (170 episodes).





### SpinRadio

Mojo Media Labs

MANAGEMENT · 

SpinRadio is your digital marketing and sales radio show for marketing directors and sales managers. A lively and sometimes irreverent take on the industry, it has been desc [MORE](#)

[▶ Latest Episode](#)[+ Follow](#)[...](#)

#### Episodes

[See All](#)

<small>DEC 14, 2018</small> <b>E170: Lessons Learned in 22 Years of Business</b> <small>Michael signs off and share lessons learned in 22 years of business.</small>	50 min	...
<small>DEC 7, 2018</small> <b>E169: Current Social Platform Demographics and What It Means to Your Business</b> <small>SpinRadio</small>	27 min	...
<small>NOV 30, 2018</small> <b>E168: Shifting from Text-based Marketing to Audio &amp; Video Marketing</b> <small>SpinRadio</small>	36 min	...
<small>NOV 16, 2018</small> <b>E167: WordPress Exploits, Holiday Campaigns &amp; Social Media News</b> <small>A smorgasbord of weekly roundup for today.</small>	23 min	...





**Wealth Redefined®**  
Michael Reynolds  
INVESTING · UPDATED BIWEEKLY

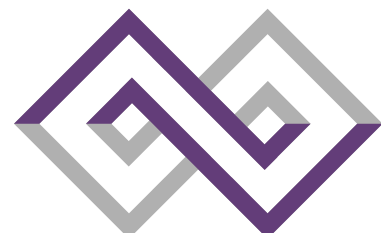
Practical discussions and insights on money with a modern approach to building wealth. Hosted by Michael Reynolds, independent financial advisor and Principal of Elevation Financial.

[▶ Latest Episode](#)[+ Follow](#)[...](#)

Episodes			<a href="#">See All</a>
WEDNESDAY			
<b>E112: Don't Let Your 401(k) Become Escheated</b>	8 min	...	
It's easy to let old 401(k) accounts sit dormant when you leave a job. So what happens if you forget about it for a while? It may be in danger of escheatment. We'll talk about what that means and how to avoid it.			
JULY 21			
<b>E111: A Guide to Quarterly Estimated Taxes (with Kim Padgitt)</b>	29 min	...	
As business owners or 1099 contractors, it's likely that we need to pay quarterly estimated taxes. But how do they work? How much do we need to pay? We'll discuss the mechanics of quarterly estimated taxes today with Kim Padgitt from The Tax Adv...			
JULY 14			
<b>E110: How to Build a Socially Conscious Business</b>	27 min	...	
For many business owners, it's not enough to just make money. We also want to have a positive impact in the world and in our communities. We'll talk through some ways businesses can align business with values.			
JULY 7			
<b>E109: What Documents Do I Need to Keep on File?</b>	17 min	...	
We encounter a lot of financial documents throughout our lives. Which ones do we need to keep on file and for how long? This episode includes a downloadable checklist.			
JUNE 30			
<b>E108: What Issues Should I Consider When Starting a New Job?</b>	13 min	...	
Wealth Redefined®			
JUNE 23			
<b>E107: Should I Invest in Digital Assets (Cryptocurrency) Like Bitcoin?</b>	28 min	...	
Are you thinking of investing in Bitcoin or other digital assets? Are you experiencing FOMO but not sure if it's wise to invest and if so, how much? And what about the envi...			

# Today

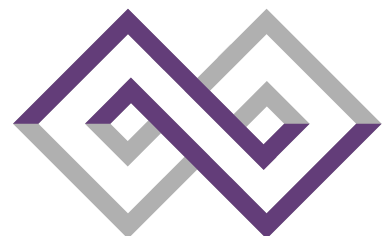
- Launched RIA on March 1 2019.
- Launched podcast in April of 2019.
- 113 episodes in.
- Published weekly.





# Agenda

- Format & content: what to talk about, how to format your show.
- Tools: hardware, software, toys and tech.
- Promotion: how to use your podcast to get clients.





# Obbligatory Podcasting Stats

## Podcast Listeners Have Grown 29.5% in 3 Years

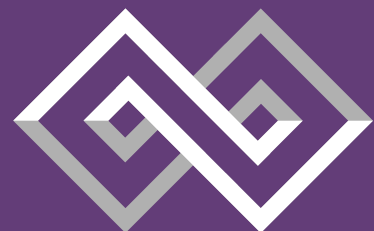
In 2018, 44% of Americans 12 or older had listened to a podcast, compared to 57% in 2021.

## 41% of Americans Listen to Podcasts Monthly

In 2021, 116 million people listen to a podcast monthly.

## Monthly Podcast Listeners Have Grown 61.5% in 3 Years

In 2018, 26% of Americans 12 or older listened to podcasts monthly, compared to 41% in 2021.





# Obbligatory Podcasting Stats

## More than half of Americans Ages 12-34 Listen to Podcasts Monthly

As of 2021, 56% of all Americans, 12-34, listen to at least one podcast per month, compared to 49% in 2020.

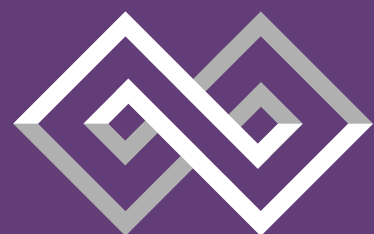
## Monthly Podcast Listening Growing Fastest Among Older Americans

From 2020 to 2021, the percentage of Americans ages 55+ who listen to podcasts monthly increased by 18%.

At present, more than one-quarter of all 55+ consumers in the United States are listening to podcasts a month.

## Each Week, More Americans Listen to Podcasts Than Have Netflix Accounts

In 2021, 28% or 80 million Americans are weekly podcast listeners. 69 million Netflix account owners in U.S.





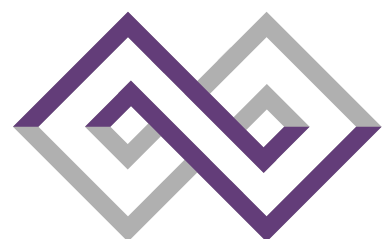
# Powerful Medium

- Easy to produce (if you like to talk).
- Intimate and personal.
- Showcases your personality.
- Expresses nuance.
- Easy to consume:
  - Running & working out.
  - Driving/walking/cycling.
  - While doing other tasks.





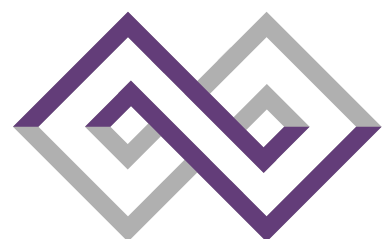
# Bullish on Podcasting





# Format

- Align format with your personality.
- Take logistics into account.
- Possible formats:
  - Monologue.
  - Interview.
  - Radio show or business show.
  - Hybrid.







## Monologue

- You and a microphone.
- Like giving a presentation each week.
- Low-maintenance (no relying on others).
- Easy to maintain and publish.
- Centers on your expertise.







## Interview

- Brings on a guest each time.
- Leans on their content and/or expertise.
- Takes skill to be a good interviewer.
- Can be challenging to consistently line up guests.
- Production quality can vary based on guest.







## Radio Show

- Great if you have a partner or team member.
- Dynamic and interesting.
- Good to showcase difference viewpoints.
- Feels like a “business show”.





# Content

- Answer questions your clients ask.
- Lessons from client cases.
- Monitor XYPN Forums & FB Group.
- Get ideas from fpPathfinder.
- XYPN, NAPFA, fund managers, etc.
- Go deep and specific.
- Align with your niche & culture.





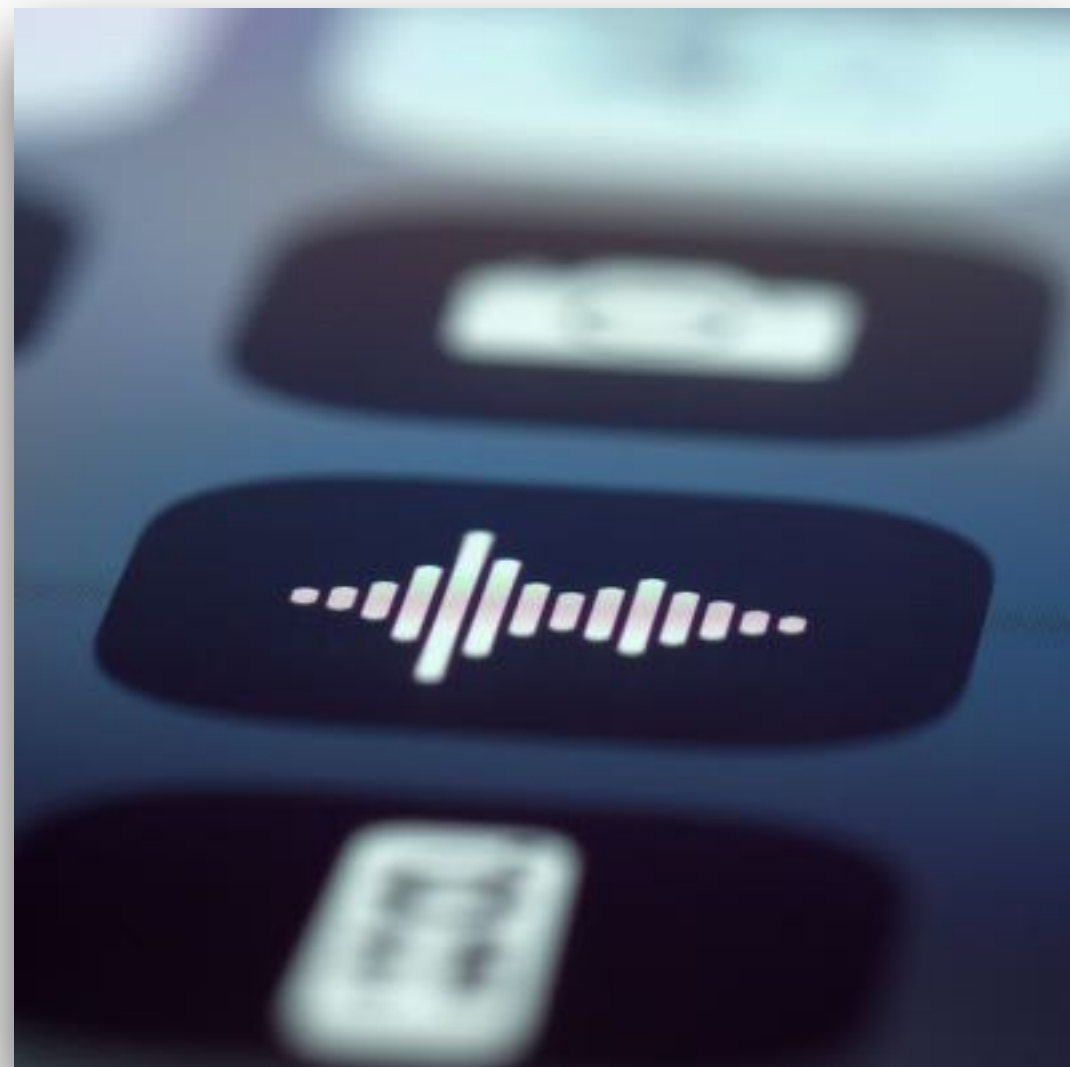


## Tools & Tech

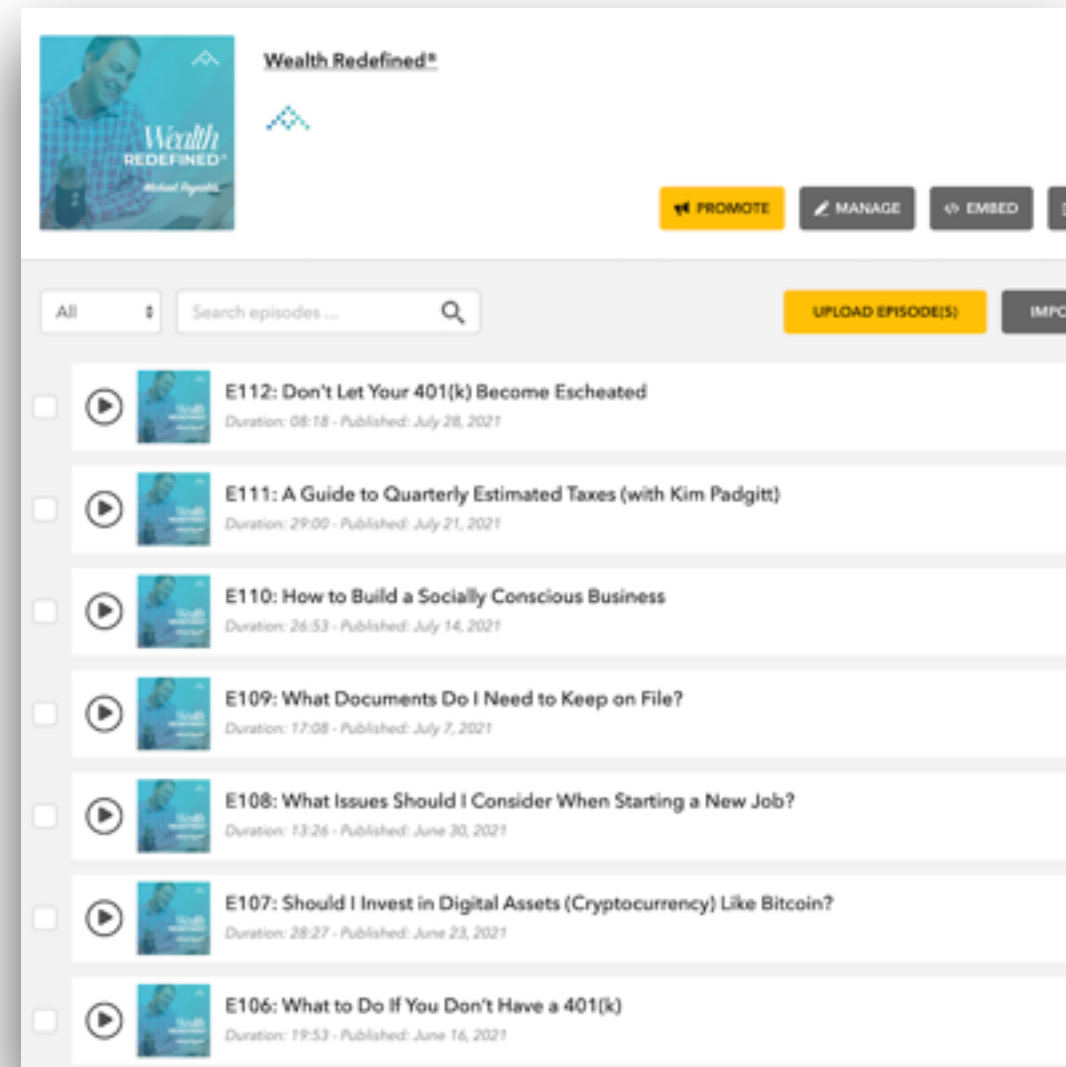
- Can go very low cost.
- Can also spend thousands.
- Great tools help, but not critical.
- Can always upgrade later.







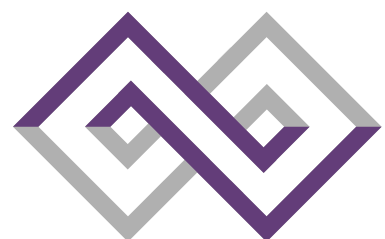
*Record & Edit Audio*



*Upload to Hosting Platform*



*Channels Publish Episodes*







## Minimal and Low Cost

- Smart phone.
- Zoom account.
- Earbuds or basic headset.
- Editing tools:
  - Garage Band.
  - Adobe Audition.
- Podcast hosting platform:
  - Spreaker.
  - LibSyn.







## Basic Pro Setup

- Quality mic.
- Good headphones.
- Quality music:
  - Tune Fruit.
  - Premium Beat.







## Advanced Setup

- RØDEcaster Pro.
- Podmic w/mount.
- Quality headphones.





# Promotion

- Podcast is “middle of the funnel” content.
- Bridges the gap.
- Differentiates you compared to others.
- Helps with prospect decision-making.
- Helps you get referrals.
- Strengthens your brand.





# Integrate Into Your Website

## Wealth Redefined® Podcast

Practical discussions and insights on money with a modern approach to building wealth.  
Hosted by Michael Reynolds, independent financial advisor and Principal of Elevation Financial.



EP112

### E112: Don't Let Your 401(k) Become Escheated

It's easy to let old 401(k) accounts sit dormant when you leave a job. So what happens if you forget about it for a while? It may be in danger of escheatment. We'll talk about what that means and how to avoid it.



EP111

### E111: A Guide to Quarterly Estimated Taxes (with Kim Padgitt)

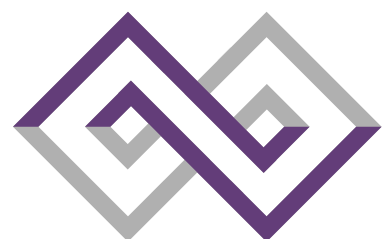
As business owners or 1099 contractors, it's likely that we need to pay quarterly estimated taxes. But how do they work? How much do we need to pay? We'll discuss the mechanics of quarterly estimated taxes today with Kim Padgitt from The Tax



EP110

### E110: How to Build a Socially Conscious Business

For many business owners, it's not enough to just make money. We also want to have a positive impact in the world and in our communities. We'll talk through some ways businesses can align business with values.





# Integrate Into Your Website

## E104: Budgeting With An Irregular Income

May 26, 2021

Budgeting with an irregular income can be a challenge. But it's not impossible. We'll cover some approaches and tips for making your budget work even with unpredictable cash flow.



The image shows a podcast player interface for the episode "E104: Budgeting With An Irregular Income" on the Spreaker platform. The player includes a yellow play button icon, a heart icon for likes, a speech bubble icon for comments, a share icon, and an information icon. The progress bar shows the episode is at 00:00 out of 26:22. Below the player are three buttons for downloading the episode: "Apple Podcasts", "Google Play", and "Spotify". The background image of the player shows a man, Michael Reynolds, smiling and talking into a microphone. The text "Wealth REDEFINED" and "Michael Reynolds" is visible on the right side of the player.





[View in browser](#)



## Don't Let Your 401(k) Become Escheated

What does that even mean?



It's easy to let old 401(k) accounts sit dormant when you leave a job. So what happens if you forget about it for a while? It may be in danger of escheatment. We'll talk about what that means and how to avoid it.

*Enjoy the episode via audio podcast or video below.*

## Send in Email Newsletter

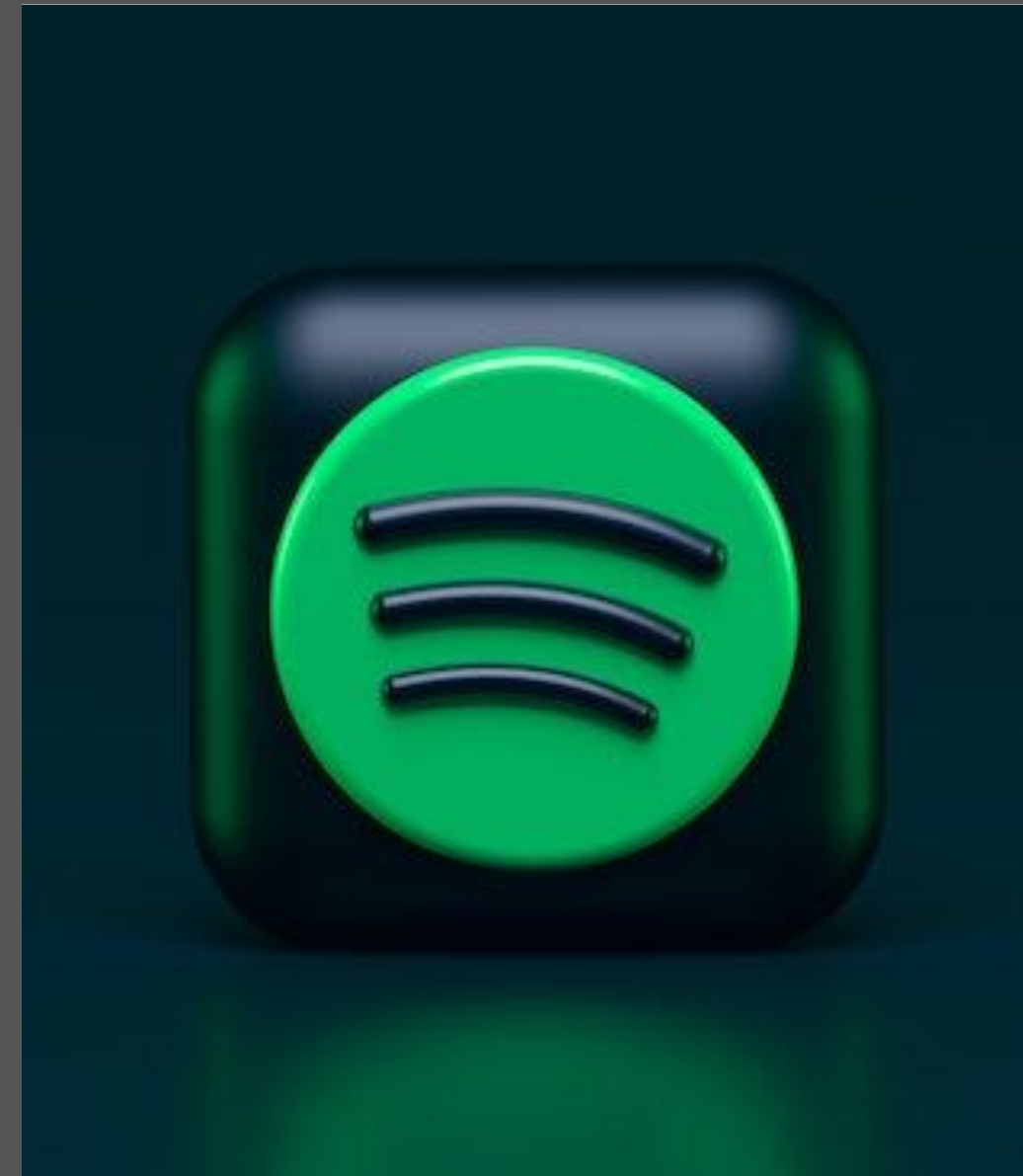
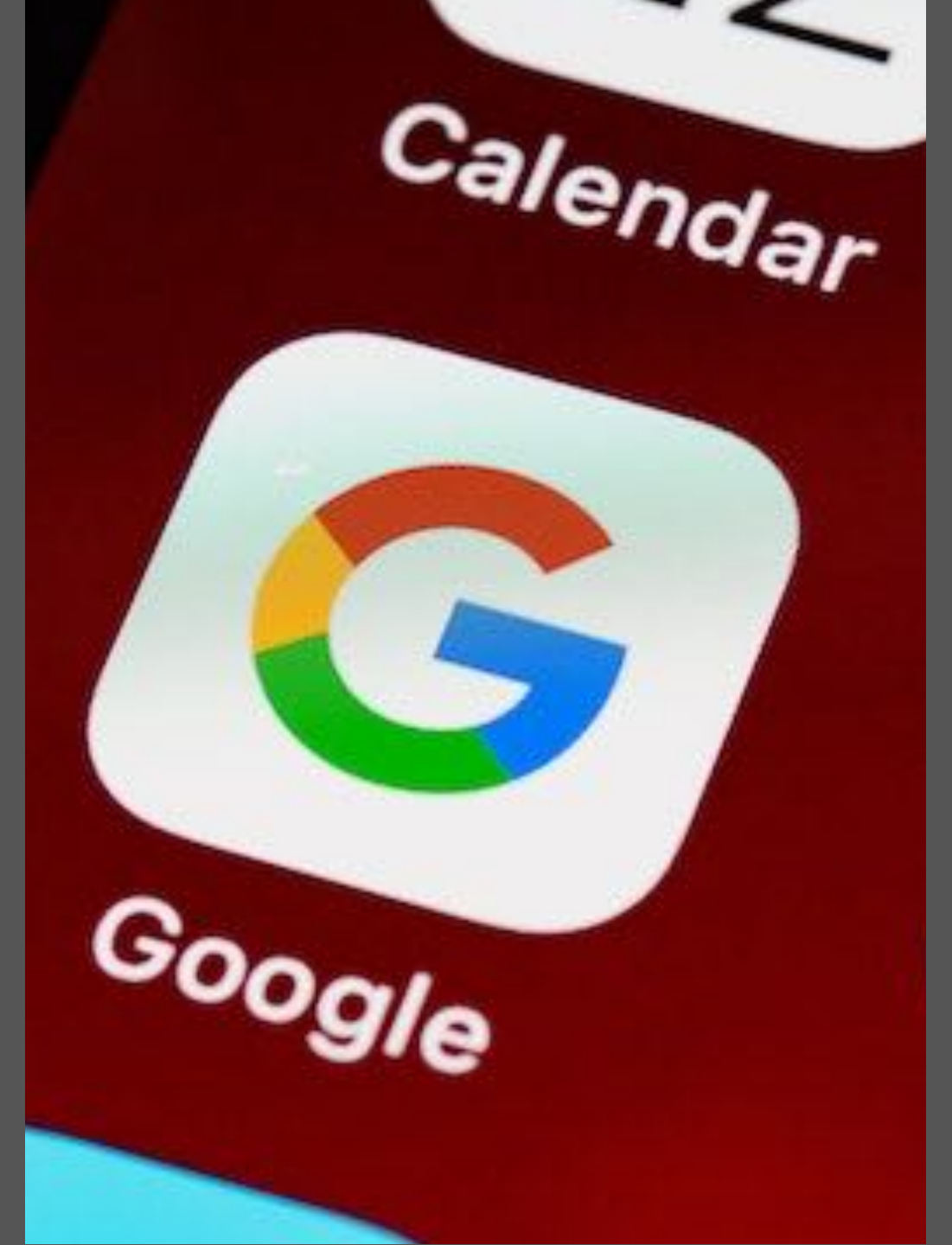
- Include as part of general newsletter.
- Make it a standalone email.





# Distribution

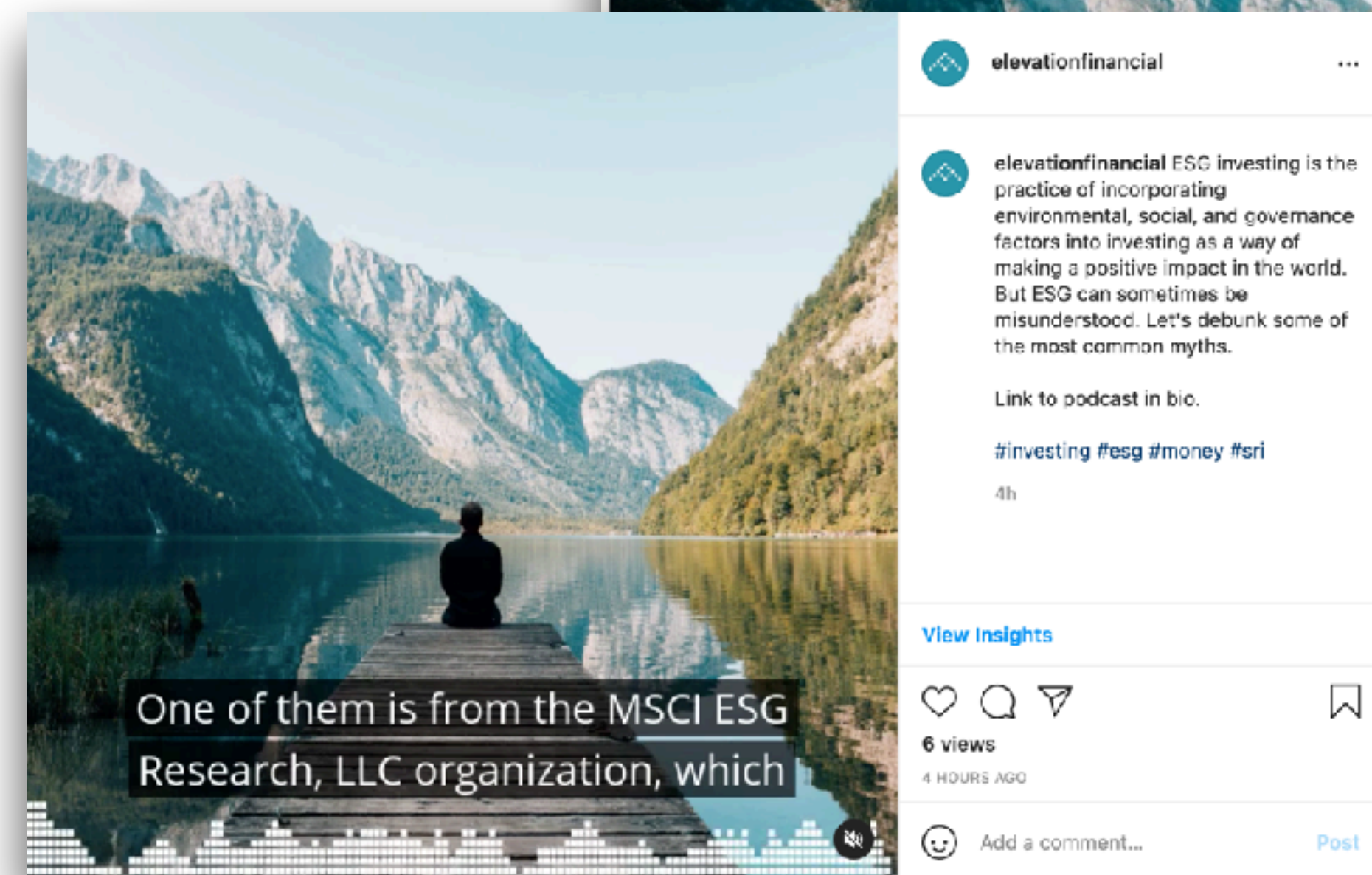
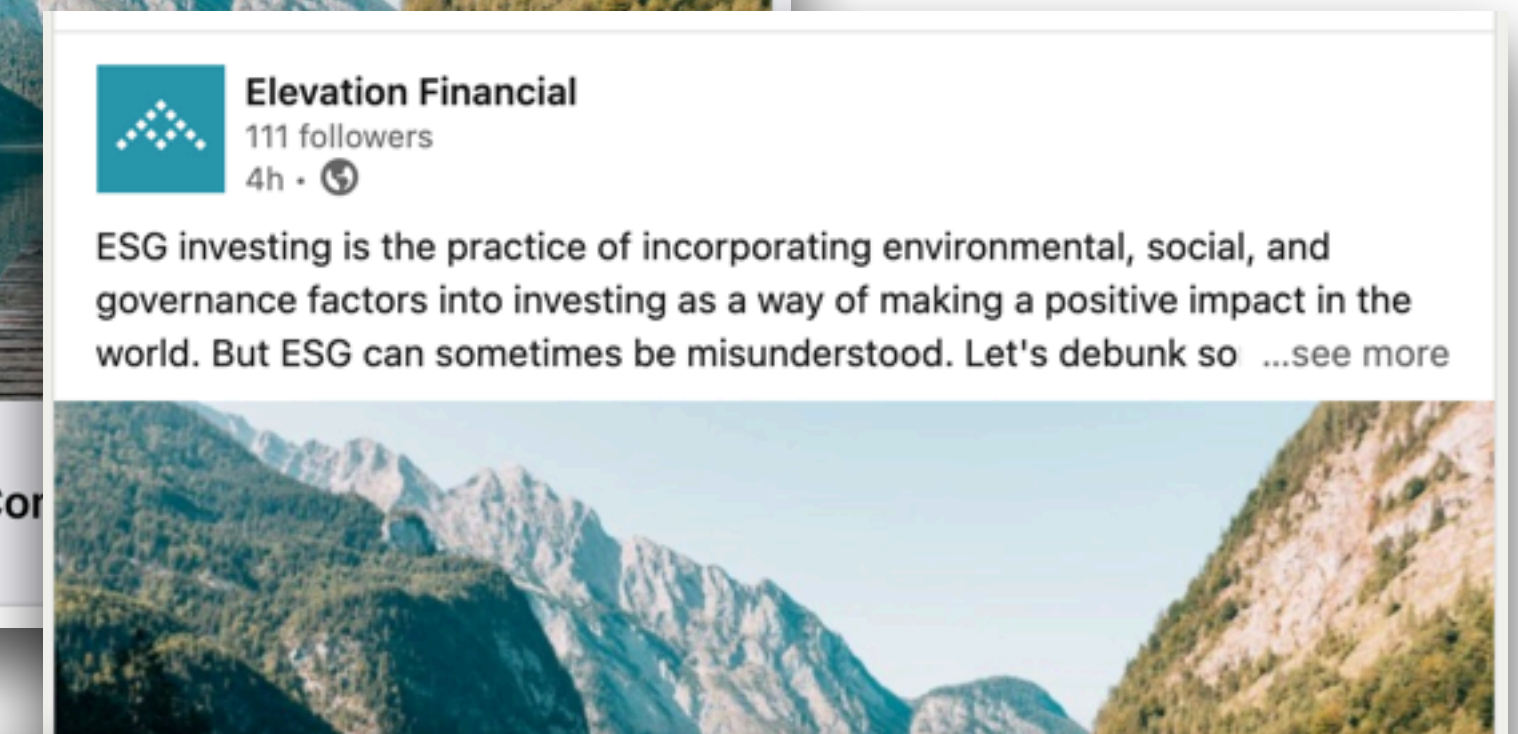
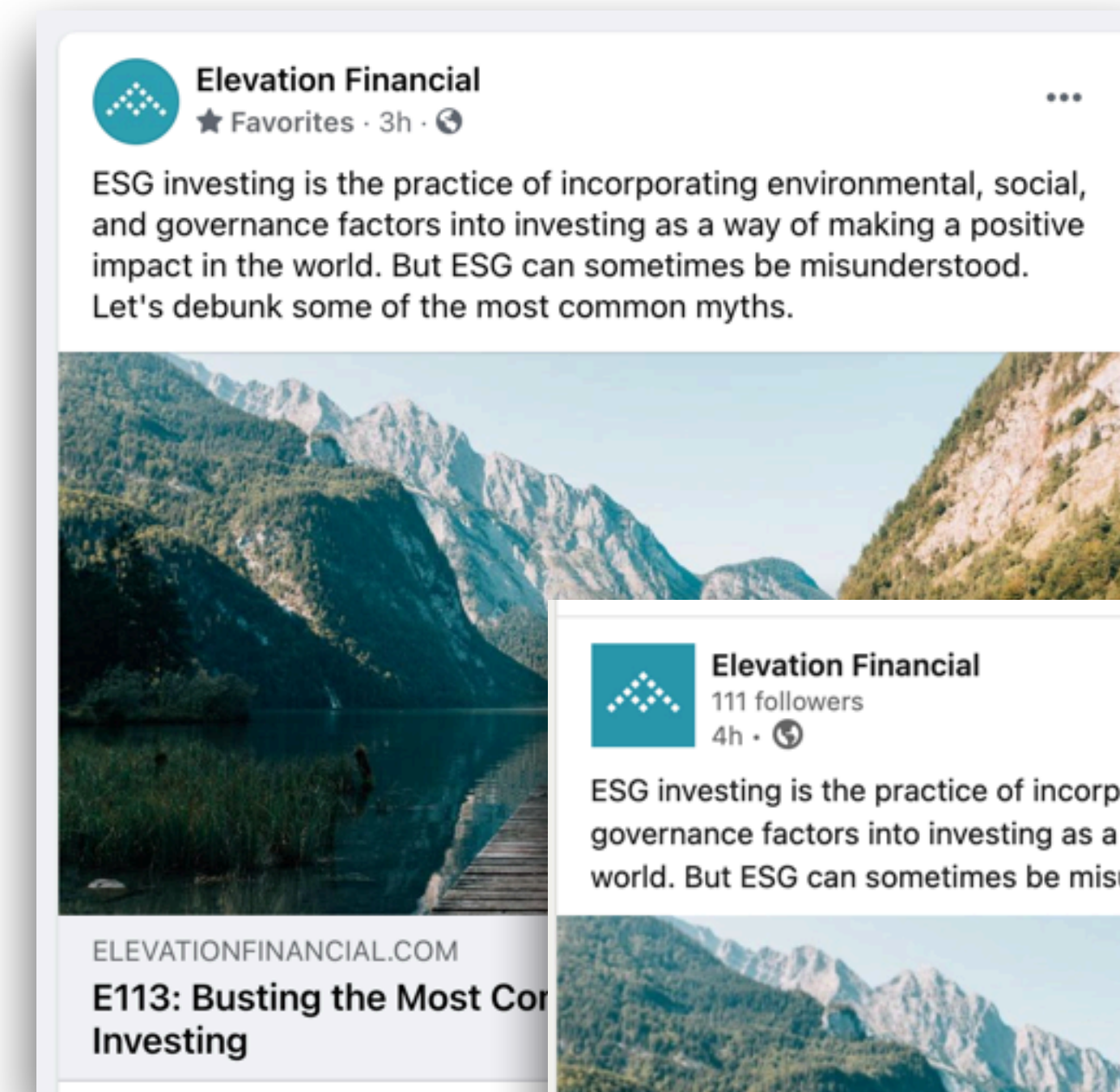
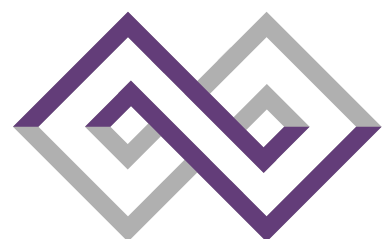
- Apple Podcasts.
- Google Podcasts.
- Spotify.





# Share on Social Media

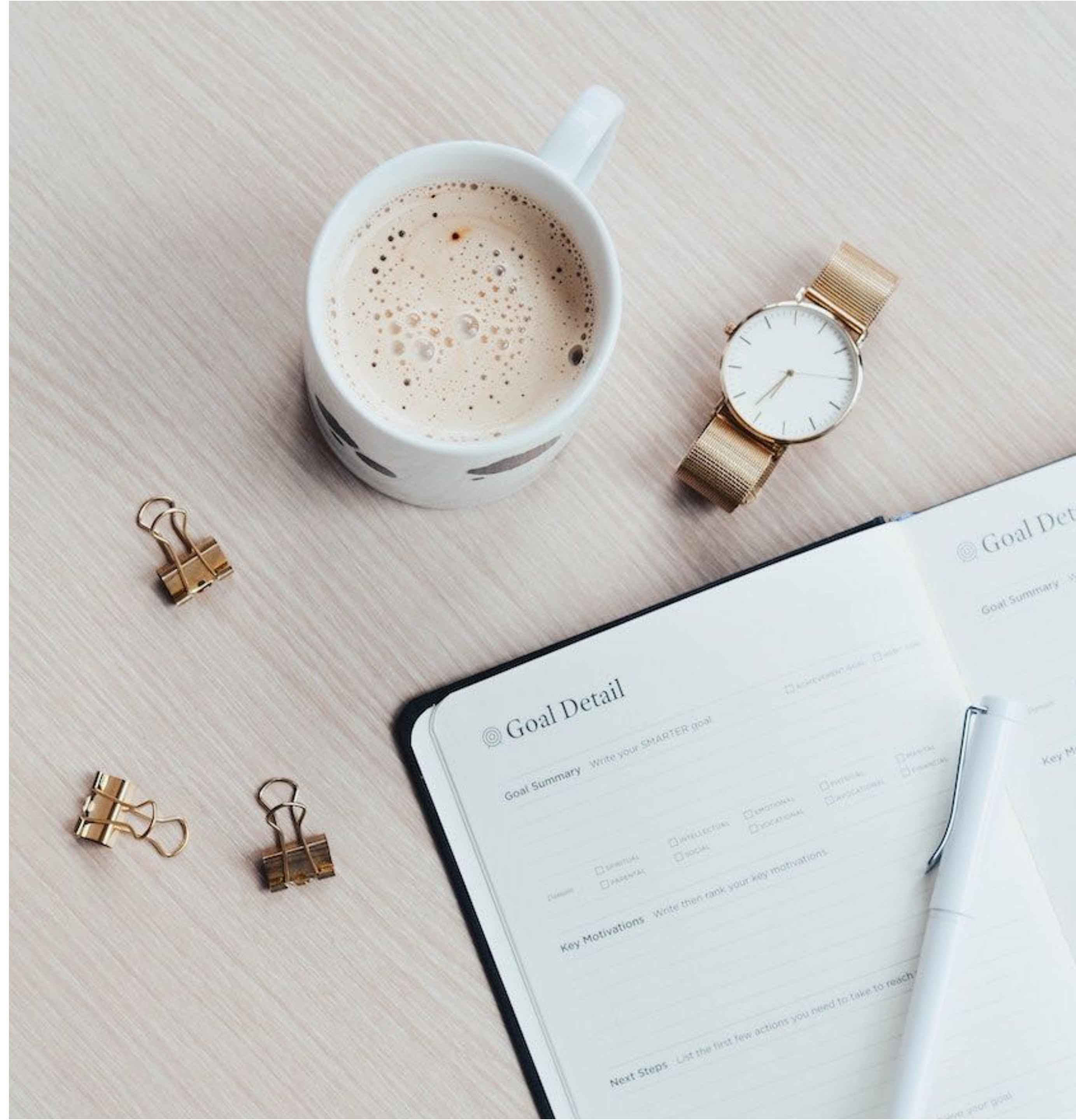
- Share on your properties every time.
- Spice up with tools like Headliner.
- Re-share to your personal accounts.





# Goals

- Speak to my clients and community.
- Not a goal to become famous.
- **Help prospects with the decision gap.**
- Differentiate myself.
- Keep my attitude curious.
- Get referrals.
- Provide tools to clients.





# HAVE QUESTIONS?

---

Contact Michael Reynolds - [michael.reynolds@zephyrcms.com](mailto:michael.reynolds@zephyrcms.com)

