

[Intro]

Welcome to the PlanVision podcast, where we share simple, straightforward investment and planning ideas for normal people. The description in this podcast is for informational purposes only. Do not construe this as personal tax, financial, or legal advice for your situation.

[Mark]

It's Mark Zoril with the PlanVision podcast and this is one of the fun ones where we get to introduce a new staff person. And I've got with me Randal Best who will be starting with us soon. Hi Randal, how are you?

[Randal]

Pretty good Mark, thank you. Thanks for having me.

[Mark]

So can you tell us a little bit about your background, what you've been doing as an advisor prior to coming to PlanVision?

[Randal]

Sure. I've spent most of my career in financial services, everything from banking and insurance to running my own advisory practice. I've also been in supervision and coaching roles as well. A lot of my background has been helping advisors build and manage practices and working with clients on planning issues and helping simplify complex financial planning topics so they can understand those to make better decisions for themselves. Most recently, I've been working internationally supporting military communities and living abroad, so I've had some exposure dealing with people in cross-border issues and relocation issues and some of those types of things.

[Mark]

Alright, great. So what work will you be doing here with us at PlanVision?

[Randal]

Well, I'll primarily be working with PlanVision clients in a planning-focused role. That role includes reviewing financial plans, helping clients navigate the financial planning process and tools, discussing retirement and cash flow scenarios, and helping them think through broader planning questions.

[Mark]

And what are you looking forward to about working here?

[Randal]

Well, a large part of the work I'll be doing will involve clients living internationally in different parts of the world. I enjoy working with internationally based clients because they often have unique planning situations and perspectives. And what really gets me excited about this too, I'll be focusing on the planning side of the relationships and helping clients think through important life and financial decisions.

[Mark]

That's great Randal, we're delighted to have you here.

[Randal]

Well thanks Mark, I'm very happy to be here.

[Outro]

Thank you for listening to the PlanVision podcast. Let us know if you have any questions or comments on the topics covered.