

NEWS

For Immediate Release

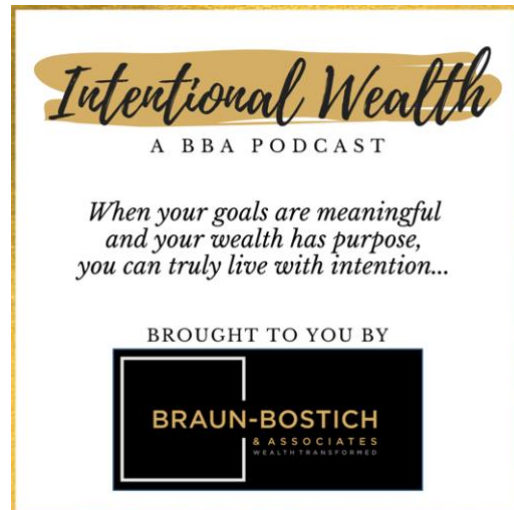
Media Contact:

Jonny Swift

Impact Communications, Inc.

913-649-5009

JonnySwift@ImpactCommunications.org



Braun-Bostich & Associates Launches New Podcast, Shares Survey Results from NEXA Insights

'Intentional Wealth' podcast features financial experts that deliver useful insights and strategies

CANONSBURG, PA (September 28, 2021) – Braun-Bostich & Associates, an SEC Registered Investment Advisory and comprehensive financial planning firm located in greater Pittsburgh, recently launched their new podcast, [Intentional Wealth](#), where alongside notable financial professional guests and aligned experts, Private Wealth Advisor and Founder of Braun-Bostich & Associates, Amy Braun-Bostich, delivers useful insights and strategies to help listeners live their best financial life.

The name of the podcast comes from one of Braun-Bostich & Associates' mottos: "When your goals are meaningful and your wealth has purpose, you can truly live with intention" – a phrase that guides everything that Braun-Bostich & Associates practices and implements for their clients. The first two episodes of the monthly podcast are out now and available on [Apple Podcasts](#), [Spotify](#), [Google Podcasts](#), and all the other major podcast platforms.

"I am very excited to deliver great content and educational information in a convenient podcast medium, which allows us to reach out to our clients with valuable content on a regular basis, as well as anyone else that wishes to subscribe," said Amy Braun-Bostich, MSFP, CFP®, CFS®, APMA®, CLTC®, Founding Partner and CEO of Braun-Bostich & Associates. "Our guests are experts whom I value the insights of, and I think our listeners will as well."

[Episode 1 of Intentional Wealth](#) features estate planning expert Philip Goldblum, attorney and Managing Partner at Goldblum Sablowsky, LLC, discussing the ins and outs of estate planning and how to navigate tough decisions ahead of time in order to pass on business and family wealth to future generations in a caring way. Estate planning can be

challenging and even uncomfortable to discuss, but it's a discussion that everyone must have to ensure that loved ones are taken care of. In this episode, listeners will learn how to hold these discussions, how to find right-fit estate plans, how to keep peace in the family, and more.

[Episode 2 of Intentional Wealth](#) features Medicare planning expert Cassy Phillips, Senior Account Executive at Insurance Consultants of Pittsburgh, discussing the ramp up to Medicare while providing the answers needed to help when it's time to make enrollment and coverage decisions. Cassy shares the importance of planning proactively for Medicare and why it's crucial to fully understand the positive, and potentially negative impacts of all the possible decisions. Listeners will also learn about coverage options, costs, how to enroll, and much more.

Episode 3 will feature Barb LoPresti, accountant and Owner of LoPresti & Company, LLC, discussing highly effective personal and business tax planning strategies, and will be released in early October. All episodes can be accessed on the [Braun-Bostich & Associates website](#), as well as all the major podcasting platforms.

SURVEY RESULTS FROM NEXA INSIGHTS

Braun-Bostich & Associates also recently completed a survey through [NEXA Insights](#), a company that provides first-class client experience surveys and analytics for Registered Investment Advisory firms. These surveys enable RIAs to research client opinions, analyze responses with comprehensive data, analytics, and insights, identify at-risk clients, maximize client retention, build client loyalty, identify clients who are willing to refer, and better position themselves among prospective clients.

Braun-Bostich had a response rate of over 56%, and out of 180 respondents, 174 of Braun-Bostich's clients were identified as advocates. For their overall score, with a benchmark of 9.38 out of 10, Braun-Bostich received a score of 9.81. For their 'Engagement' score, with a benchmark of 9.34 out of 10, they received a score of 9.78. For their 'Satisfaction' score, with a benchmark of 9.43 out of 10, they received a score of 9.84. And for their Net Promoter Score, with a benchmark of 84 out of 100, they received a score of 98 – indicating that 98% of clients would be willing to recommend Braun-Bostich & Associates to a friend, family member, or colleague.

"I am so proud of the staff and how well they scored on servicing our clients, and I'm humbled by the great scores that the entire advice team received," said Braun-Bostich. "We work hard every day to create value for our clients and this survey validated that our clients feel the same way."

Thanks to the survey, Braun-Bostich & Associates was able to identify new opportunities with which clients needed help, including estate planning, tax planning, life insurance planning, retirement income needs, aging parent needs, and family wealth counseling. In addition, they were able to identify clients who were willing to refer prospective clients to them and were also able to gauge their clients' current market sentiment. The survey showed that they had no at-risk clients (zero clients were thinking about leaving the firm).

To learn more about NEXA Insights, please visit www.NEXAInsights.com. To learn more about working with Braun-Bostich & Associates, please visit www.Braun-Bostich.com.

ABOUT BRAUN-BOSTICH & ASSOCIATES

Braun-Bostich & Associates is a comprehensive financial planning firm and Registered Investment Advisor based in Canonsburg, PA, delivering a range of wealth management solutions to high-net-worth individuals, families, and businesses in order to help them meet their goals and optimize their financial life. Founded by Amy Braun-Bostich, CEO and Founding Partner, Braun-Bostich & Associates is focused on securing the wellbeing of clients and their loved ones for years to come. By creating strategies designed for their clients' unique needs, they help develop a roadmap to financial independence. Learn more at www.Braun-Bostich.com.

###