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To: Jodi Greiner
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Premier Insider

premierfphub.net



Automation Without Losing the Human Touch

We're all feeling it. Technology is moving fast, and it's changing how we work with clients. At this year's annual meeting, I caught myself talking A LOT about AI because it's not theoretical anymore. I've been using it daily in the office to draft messages, organize workflows, prep reports, and simplify communication. It is saving time and clearing mental space.

Still, I get why AI makes people uneasy. So much of our work as financial advisors depends on trust, empathy, and human connection. When automation enters the mix, it can feel like we're giving some of that up — or like the machines are edging closer to our livelihoods. That fear is real. Change always comes with a bit of pain before the gain.

But I've learned this: AI doesn't replace what makes us human. It can actually help us show up *more* human, if we use it well.

Let the Robots Handle the Repetitive Stuff

Automation shines on the boring-but-essential details:

- Paperwork and compliance? Let the software sweat that.

- Reminders and follow-ups? Set it and forget it.
- Scheduling, data entry, and note-taking? Let the tools do the heavy lifting.

That's time we can spend where it really matters; on strategy, listening, and helping people make sense of their money and emotions.

Keep the Human Where It Counts

Money is never just math. Clients bring their fears, goals, and stories to the table. No algorithm understands that kind of complexity.

- When someone's anxious about the market they don't need a notification; they need a voice.
- When life throws a curveball, divorce, job loss, inheritance, they need empathy, not automation.
- When setting goals, the *why* behind them matters more than the numbers alone.

That's the part only we can do.

Finding the Balance

The goal isn't to automate everything. It is to automate the *right* things. Think of AI as your backstage crew. It sets the stage so you can focus on the performance.

When it is working well, clients don't notice the tech. They just feel cared for and understood.

Automation should make us more human, not less. The more we let it handle the routine, the more space we have for real conversations. The conversation that build trust and lasting relationships.

TEAM NEWS



Our Premier family is having a baby boom! Congratulations to Jack Himpler on his new little bundle of joy. John Joseph Himpler III was born on September 16th weighing in at 8 pounds, 15 ounces, and 21 inches long. His big sister, Clare is in love with her new baby brother.



Here is baby Lionel with his big brother Olin, and it looks like Olin is pretty excited about the new baby brother! Congratulations to the entire Conley family!



Baby John and his mommy are doing great! Congrats to the entire Himpler family!



I'm excited to introduce you to Lionel Lewis Conley. Lionel is the brand new son to Zack Conley.

He arrived on August 12th weighing in at 8 pounds 3.9 ounces.

Welcome to the world AND to the Premier family baby Lionel!



See anyone you know in this pic? You should recognize the guy in the middle with the white hat. That's our very own Josh

Webinars:

November 18, 10:00AM

Topic: Trusts and Advanced Tax Planning to win Large Pools of Sticky Assets

[REGISTER HERE](#)

November Birthdays

Andy Feldman

Bryce Larson

Bryce Bauer

Gregg Karal

Ron Allison

Sonia Caban

Industry Information

[Find New Clients through Referrals and Strategic Partnerships](#)

[5 Critical Drivers Shaping Wealth Management in 2025](#)

[The Healthiest Firms Are Committed To Developing Next Gen Advisors](#)

Friendly Reminders

BE AWARE! The fee notification process has changed. Click [here](#) to see the details.

Curious how AI can help your office run more efficiently? Cambridge is hosting info sessions to show



Josh Cesare laying down the law on the PIAA football field.

Cesare. Josh has been a PIAA Football Official for over 20 years. He refereed a varsity game in September. He's rocking the stripes!

what's possible. Click [here](#) to read all about it.

If you haven't visited Market Central on the CIR2.com website yet, take a look. You'll find a variety of FREE, client-facing materials to download and use. You can also shop for Cambridge gear (including some standout sneakers). If you qualify for a club level, you'll receive a discount. Use the promo codes below:

COE25 – Circle of Excellence qualifiers receive 20% off order

PC25 – Premier Club qualifiers receive 15% off order

SC25 – Signature Club qualifiers receive 10% off order

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The link to market central is [here](#).

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