

**Ep #298: Strategic and Authentic Podcasting: A  
Conversation with Aaron Agte, Michael Reynolds, and  
Trishul Patel**

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**Maddy Roche**

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**Narrator:** [00:00:01] Join your host, Maddy Roche, as she brings you into a community of fee-only financial advisers who are successfully building profitable businesses that serve the next generation of clients. Learn from innovative advisers whose unique stories will inspire you to dream big and take action on your goals. Are you ready to live your best life and help your clients live theirs? Then you're in the right place.

**Maddy Roche:** [00:00:24] Hello and welcome to #XYPNRadio. I'm Maddy Roche your host. Today, I'm excited to interview Aaron Agte, Michael Reynolds, and Trishul Patel, all XYPN members, all RIA owners, and all podcasters. Today's episode is fun. We're going to discuss the intricacies of hosting a podcast as a primary form of content marketing. And as you'll learn, each of these advisers approach their podcasts a little bit differently, in terms of structure, format, and purpose. Aaron and Trishul hosts their podcast together even as they run independent our RIAs. Michael, on the other hand, hosts a live show and finds that this is a medium he enjoys much more than others. The group shares insights about how to leverage this intimate medium, how listeners desire insights and not information, and how the medium has allowed them to establish credibility among their listeners. Listeners pull out a pen and paper for this episode, these guys are going to share you with ideas on platforms and technologies to use and of course, share tips on keeping a cadence that works and maintaining a passion that's contagious. If you're interested in starting a podcast, this episode is for you.

**Maddy Roche:** [00:01:34] Avocado toast, selfies, a mountain of student loan debt. Gen Y is anything but traditional, and with over seventy five million people, it's a population you don't want to ignore. Learn more about

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how to serve this unique population in our guide called Attract and Profitably Serve Millennial clients in your RIA. Discover three key ways to tap into the millennial market and six things that they want from their financial advisor. Visit XYPlanningNetwork.com/Millennials for your free copy.

**Maddy Roche:** [00:02:07] You can find any of the resources we mentioned during the episode at XYPlanningNetwork.com/298. Also be sure to go to XYPlanningNetwork.com/VIP to join our private group, just for #XYPNRadio listeners. It's the community of advisors we've all been looking for that's there to provide support when we need it the most. Best of all, it's free. I encourage you to check it out. Again, that's XYPlanningNetwork.com/VIP. Without further ado, here's my interview with Aaron, Michael, and Trishul.

[00:02:35] -- swish --

**Maddy Roche:** [00:02:36] Hello. Good morning and welcome to #XYPNRadio. Aaron, Michael, and Trishul so good to have all of you on.

**Aaron Agte:** [00:02:43] Good morning.

**Michael Reynolds:** [00:02:44] Good to be here.

**Trishul Patel:** [00:02:44] Great to be here.

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**Maddy Roche:** [00:02:45] Awesome. Listeners, you can hear a number of different voices. We've got three guests today talking all about podcasting, one of my favorite topics in the whole world. Michael, let's start with you. I'd love for you to introduce yourself and your firm to our listeners, please.

**Michael Reynolds:** [00:02:59] Sure. I'm Michael Reynolds. My firm is Elevation Financial, [elevationfinancial.com](http://elevationfinancial.com). It's just me. I'm a solo practitioner and have kind of a focus on solo business owners as well as ESG investing. And I'm located in Indianapolis, Indiana area.

**Maddy Roche:** [00:03:14] Awesome thanks, Michael. Trishul, how about you?

**Trishul Patel:** [00:03:18] Hey, great to be here. So my firm is Investing Forever Advisory, [investingforever.com](http://investingforever.com), and I focus on helping young professionals achieve financial freedom sooner rather than later. And I'm here in Pennsylvania now, but I'm in the process of packing our bags and shipping back to Florida, where I want to set up home base.

**Maddy Roche:** [00:03:40] Oh, awesome. Okay, so you've got a compliance thing to handle in the coming months.

**Trishul Patel:** [00:03:45] A little bit XYPN compliance is helping with that.

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**Maddy Roche:** [00:03:48] Good, good, good, good. Thanks Trishul. Aaron, How about you tell the listeners a little bit about yourself and your firm?

**Aaron Agte:** [00:03:54] I'm doing well. Glad to be here. I am based in the Bay Area. I am also a solo practitioner like Michael. My firm is Greystone Advisor. It's a little generic, so it's actually easier to find me to specify my name. Aaron Agte. I have an expertise in stock options and equity compensation and being in the Bay Area tends to lead to a lot of helping couples with equity compensation, usually in the tech industry. So there are a lot of financial planning around ISO's exercise and sales strategies.

**Maddy Roche:** [00:04:26] Awesome, wonderful. Well, I'd love to talk to each of you for a whole episode just about yourself and your firms. But the reason we're all gathered today is to talk about your podcasts, which each of you have. So, Michael, I'll start with you again. Go ahead and let the listeners know a little bit about your podcast and what you've built.

**Michael Reynolds:** [00:04:43] Sure. My podcast is called Wealth Redefined, and I'm on episode ninety two, I believe, give or take. So I started it pretty early on when I started my firm in 2019, in March of 2019. I think like a month, within a month I started the podcast and it's like I said it's-it's a weekly podcast. I put out every week. I do a Facebook and YouTube live as well, which I know we'll talk about later. And it's been a lot of fun. I'm a former digital marketing agency owner, so I've been podcasting for literally like six or seven years in different contexts. So podcasting is really kind of natural for me. And it was kind of a no brainer. It was not even a question. When I started my firm, I knew I was going podcasting. This something I was going to definitely do. So it's been a lot

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of fun. I've gotten clients from it. I'm sure we'll talk more into that stuff later. But yeah, I'm almost up to one hundred episodes.

**Maddy Roche:** [00:05:31] Awesome. Oh, that's celebratory. Congratulations, Trishul and Aaron, you're both on because your co-hosts of a podcast together. So Trishul, let us know a little bit about the podcast you and Aaron have built.

**Trishul Patel:** [00:05:44] Sure. That the podcast is the Mind Money Spectrum. And what we try to do is we make it conversational. Aaron and I pick a topic and we chat for about an hour or so, kind of just going back and forth, exploring how that particular topic might be interesting to us and the nuances we see. If related to that topic. And what we're really trying to do is go a little bit deeper and go beyond the standard finance questions to help our clients understand how they might think about money, how it might affect them, and how they can leverage this information so that they can live their their best life and achieve financial freedom.

**Maddy Roche:** [00:06:19] Awesome. Aaron, tell us a little bit about the format, cadence, how you run that podcast.

**Aaron Agte:** [00:06:25] Yeah, I unlike Michael, we didn't know we were going to start doing podcasting. We actually started from a very similar time frame. I actually thought I'd be blogging once a week, but I found like I didn't enjoy writing that consistently. But the conversation with Trishul has been really easy to keep going. We'll try and plan a topic a week or two in advance if we can think of something and we might do a little basic

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research, but it's things we're already aware of and really trying to, like, go back and forth, exploring some of the nuance, some of the depth and using the, we like to think it's going to be forty five minutes, but we always run long. But using the conversation to ask each other questions, kind of almost forcing each other to just take that next step in terms of our mental exercises, like actually putting up just a little bit more thought, guessing how this could apply and the conversations with Trishul I've just really enjoyed and it's made the podcasting format that much easier.

**Maddy Roche:** [00:07:28] Oh, and I love it. And I love that you two are running two separate firms, too. So Trishul how did this conversation start about podcasting?

**Trishul Patel:** [00:07:36] Yeah, so Aaron and I are in the same mastermind group and after a couple of months we just said, how about we meet up one afternoon and just start recording on a topic? We didn't really have any sort of long term plan or vision or pretty much anything besides, let's just chat for an hour. And that's what we did. We spent one Wednesday and we said, okay, click record. Let's talk about this certain topic. And we did. And then after the hour ended, we're like, okay, let's meet again next week. And we just kind of did that for about a month or two and that's how it started going.

**Maddy Roche:** [00:08:10] Oh, I love that. Michael, I've always felt like podcasting in this space was only something in the past five, six years that have come up. It sounds like you were really planning with intention to have a podcast all along. What did you know about podcasting in the space that made you feel confident that this was a route you were going to take?

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**Michael Reynolds:** [00:08:27] Yeah, so I'm kind of a hardware and tech geek when it comes to podcasting. So in my marketing agency, which I sold back in 2018, I had been running a podcast for about five years. And so I already went through all the process of finding equipment and buying fancy stuff to put together and make a really cool podcasting studio. So I was very confident on the tech end already and then just getting used to running a podcast every week and just kind of making it a habit with something that was already just kind of natural to me at that point already because I've been kind of baked into what I've been doing. So yeah. So it's actually pretty easy. I just kind of exactly how to approach it because I've been doing it in a different company previously already. So from day one it felt pretty natural.

**Maddy Roche:** [00:09:06] Awesome. Where as Trishul and Aaron, it sounds like you waited a few months before you even made your content live. Can you talk a little bit about that, Aaron?

**Aaron Agte:** [00:09:15] So I remember in our mastermind group. We're talking about the FIRE, financial independence retire early. This is something that Trishul has pursued and I've actually written in the past about on Quora and other sites. And basically I disagreed with him. I felt like pursuing FIRE was chasing the wrong solutions. And it just, it was-it was a interesting conversation in our mastermind group. And we kind of talk like, let's have this conversation recorded. And we didn't know if we would be able to have that conversation smoothy. We didn't know if it'd be awkward pauses. If they like, we'd run out of topics. And so, like, we didn't have this plan of getting a podcast up over 50 episodes. It just let's see if we can stand, stand talking to each other for an hour each week. And we

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want to make sure that we had that part first before we even looked into the production side, paying for hosting, like we want to make sure that we liked each other enough and that this felt sustainable. So I think that was that was our initial take. Let's see if we can get eight episodes and see if we can talk kind of eight straight weeks and then we'll actually look into the production side. And it worked out and Trishul did a lot of-a lot of heavy lifting in terms of the research on how to actually produce the podcast.

**Maddy Roche:** [00:10:37] Awesome. Michael, I'm interested. Did you set out with your podcast with a vision? Did you did you really have things organized in terms of what your topics were going to be, how you were going to approach the first release of the episode as you started your firm? How did the podcast layer into that?

**Michael Reynolds:** [00:10:53] Yeah, it was pretty intentional. I knew that I wanted to be very practical. My brain is pretty tactical and practical when it comes to just kind of productivity and how I approach things. So I knew I didn't want to do like the hour and a half Kitces style podcast where it's like, you know, this big, huge conversation. I wanted to be more kind of focused on really shorter topics and shorter, really specific things. And so I knew that that's kind of where my format was going to go. And I did have a few topics laid out. I had maybe ten topics planned out already just to have a runway. But then I pretty quickly just said every week I'm just sometimes I have things planned out. I have a short list going, but sometimes, you know, I won't know what I'm going to talk about until that morning just because I've got a few client questions that came up last week and I'm kind of juggling them into my brain. I'm like, okay, I'll do that. So I'll keep it pretty, pretty free form and pretty flexible and fairly spontaneous some weeks of it I'm interested in.

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**Maddy Roche:** [00:11:52] Trishul, how do you hold the podcast as a marketing tool for your firm when you're sharing that with Aaron as a separate business owner?

**Trishul Patel:** [00:12:02] So we've created a separate website and a separate marketing for the podcast itself. So it's basically marketing for the marketing and the way we kind of set it up as it has its own domain. The MyMoneySpectrum.com, it's hosted on its own website. It has its own logo and everything like that. And then from that standpoint, we're free to market it however we would like to. I have it hosted on my website, meaning I just have the ability to play episodes integrated into my website. And whenever we release an episode, we can share it across our own social media websites. So from that standpoint, it's just this other tool that allows each of us to have this visibility beyond just our businesses alone.

**Maddy Roche:** [00:12:48] Hmm, Aaron any other considerations you took before you launched this podcast, whether it's in terms of marketing or compliance, of just how you were going to manage two separate businesses with one podcast.

**Aaron Agte:** [00:12:57] Honestly no, I feel like it was a lot of like, let's do this first and then figure out the other stuff later. We, it's like if we had the content which felt, I think that would be the harder part. We can figure out the rest of it as it went along. So XYPN compliances helped us. Like we have, we're both-we're both archiving the same website and kind of keeping track of that, we had to kind of get arrangements with that, the buzz sprouts Trishul found kind have helped a lot of the walking through us,

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the steps. We split the cost, so he'll pay six months, then I'll pay six months. Then we keep flipping back and forth. And it's kind of, there is a lot of trust implied in that. It's like I think technically he owns the domain because he just happened to buy it the first time. But similar to him, I have it on my website and I-I don't necessarily use it for marketing per say, but it has come off as a good resource of, I've having a conversation with a client or prospect. I've actually had the much longer conversation. I'm trying to give you the five minute version. But if you want the full hour of back and forth and all the nuance, I can actually email them a link to an episode and that that's been a pretty helpful. So, I am okay trusting Trishul that as long as those podcasts stay online somewhere, they still serve my main purpose.

**Maddy Roche:** [00:14:19] Love it. Love it. Michael, what were some of your considerations about launching a podcast, especially given your expertise in the area? What did you have to think about when it came to how the podcast folded into your firm?

**Michael Reynolds:** [00:14:30] So I knew I wanted to keep it pretty tightly integrate into my own brand. I've kind of toyed with the idea of doing a separate website and I might do that. But for now, it just seems more, more extra stuff for me to do. I'm not going to do it right now. So I you know, I had a cover art professionally designed. I know. And it looked like a really nice, snazzy kind of professional podcast. I've got that done. And I have a directory on my website where I post the episodes on my side, just like, you know, Trishul and Aaron do. And so there's a section on my website called Podcast. And I've got the featured episode up there and the rest of them and I've got, I use Breaker to host my podcast. And so I have the embed code listed there, as well as the YouTube video version of it on the same

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page. So just like Aaron and Trishul mentioned, I, you know, when a client has a question, a lot of times I have a podcast episode where I can say, hey, let's go deeper and I send them a link directly to it. And it's an awesome education tool. It really is a great way to help my clients understand concepts. If I only have a few minutes to talk about it, I can send them the episode and they can go deeper.

**Maddy Roche:** [00:15:28] I love that. Trishul, is this a marketing tool for both of your firms or how are you leveraging this podcast in your firm?

**Trishul Patel:** [00:15:36] I think there's two key ways that we like to leverage it, or at least I like to leverage it. Going about it initially, it was definitely a strategic venture, meaning I didn't really plan on getting clients in the first year or two. The plan was maybe over time it would have its own base that grows and then it kind of takes off from there. But initially, it's very much like how Aaron said where if a topic comes up and you're in a conversation with a prospect or a client, it's really great to kind of point back to that episode and be able to say, you know, you hear the sound bites and you hear what I'm saying. And it may sound simple, but there's a good amount of rational decision making that went on to come to that simple decision. And it's often the ability to go deeper and provide that insight that that's been helpful to kind of draw the clients in and try to keep them in. At the same time, it does also provide some sort of gravitas to the business, meaning the notion that there's a little bit more going on than just financial planning and investment management, where we have a big enterprise here, where we have some bits and pieces that we pulled in and it just makes it sound like it's a bigger venture.

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**Maddy Roche:** [00:16:47] Absolutely. There's something so authentic about sharing your voice over audio that I think translates very differently than blogging. And Aaron I loved your point that you thought you were going to blog then turns out blogging on a Friday morning is not nearly as fun as talking to a friend on a Friday morning. So how do you see this allowing you to better communicate with your audience than say blogging would be.

**Aaron Agte:** [00:17:09] I, knowing my own personality, it really just allows me to go into all the nuance. It's-there's actually I named my firm Greystone. Because I like the idea that there's so few things that are black and white. Everything's in that gray area. And even when I do write still on my website, but it tends to be a long form technical ISO exercise strategy articles that gets over two thousand words. And so I knew I couldn't do that on a weekly basis, but it could have a conversation with Trishul that both allowed the to explore that nuance, to look at those edge cases. Look at the well, here's the advice that works for most people. But if you understand where that advice comes from, then maybe you can apply it. No, actually, this other thing applies to you. And so just the time frame and the consistency of the conversation allowed to explore that nuance. And that's something I really enjoyed then. It's-it's getting away from that black and white and exploring all the, it's actually what we named the spectrum, the mind money spectrum. It's vast majority of things, it's not yes or no. It's somewhere in the middle and you decide where it is in the middle for you.

**Maddy Roche:** [00:18:18] I love that, the not hanging out on those extremes. It's always nicer to be in that gray area. Michael, how have your clients or listeners responded to your podcast?

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**Michael Reynolds:** [00:18:30] Really well. It's been fantastic. More than I expected, actually. So I've kind of got to the point now where actually I'm meeting with the client this morning and on his agenda, he want to talk about some stuff. And he's like, hey, I loved Episode ninety one where you told me about playing around the stock market. He's like it was very even it wasn't too preachy. It was just right. And like like I get regular feedback from clients saying, hey, I love this episode. Or clients will sit up and say, hey, were you talking about me? Why didn't you just like, call me out and, you know, joking with me? Because I do often take my topics from client conversations and things that come up, because I figure if one client's wondering about that and probably a lot of people are. And so it's been really well received and clients comment on it on a pretty regular basis.

**Maddy Roche:** [00:19:09] Oh, that's awesome. I loved hearing you say that you were taking and chewing on client conversations as a way to prompt what-what the topics were that you would cover. So I imagine that your clients really find this as a value-add to their experience with you.

**Michael Reynolds:** [00:19:22] Yeah, I would agree with that. Yeah. I consider it kind of part of the service I provide, even though it's free and open to everybody. It's just something my clients seem to enjoy as well.

**Maddy Roche:** [00:19:30] Awesome. Trishul, how have your clients liked your podcast?

**Trishul Patel:** [00:19:34] Yeah, similar to what Mike has related. It's definitely come up in terms of either I just unsolicited feedback you hear,

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from a client, maybe an email comes in, had one this week that said, hey, I know Bitcoins at an all time high. I've been thinking about it. We had an episode on it, things like that, or just stuff that's going on where again, if one client's wondering about it, there's a good chance many clients are wondering on about it. The markets are all time high. Everybody's getting a little edgy. Well, we talked about it and we said here's what we really think. So I think having that more up to date conversation about things that are actually going on and then being able to get that out there and then having clients and provide that more immediate feedback, it's a pretty good cycle to be in.

**Maddy Roche:** [00:20:17] Wonderful. Aaron, have you gotten any new clients from the podcast?

**Aaron Agte:** [00:20:22] Short answer is no. I-I my guess and I can kind of like where I like the format of the podcast. My guess is that it helps my site's SEO a little bit, in terms of different connections. And I do find a lot of my clients are finding me through Google SEO either financial adviser, foster cities, local area, I'm in search on Netflix stock options or how do RSUs work, so I can Google search, search console and Google Analytics kind of tell me that. But I have at least one client who has told me they found me first, then went to listen to every episode of the podcast and then came to hire me. And it was this like a confirmation of philosophy kind of thing where it's not a marketing tool per say. But like Trishul said, it kind of adds to the gravitas in the cachet of like, yes, I know what I'm talking about. But in addition to that, when you listen to me talk, you get a really good understanding of just my philosophies. The way I think about different things, my opinions on Bitcoin, my opinions on buying stocks were fine. My opinions on the FIRE strategy like you really get to understand that kind of

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advice that I would be giving to clients. And if that appeals to them, then they could kind of take that next step and and look to hire me. But I don't think too many my clients are listening to the podcast, but I do know that I at least have one client who's a very avid follower.

**Maddy Roche:** [00:21:49] That's awesome. I know as you were talking, I really started thinking about my experience working with a wonderful financial planner over the years and the value so much was always just learning from her. And so this idea of if she had had a podcast, I would have had her in my ear every week. There's an opportunity to further my understanding of finances. So what a great value-add to add to clients. Let's switch gears a little bit. I want to talk about logistics and the details of actually hosting and running and keeping up with the podcast. Michael, I want to ask you this question because you've got a lot of history with podcasting. But if an advisor was considering podcasting, what's the buy in? What's-what's what do they have to get over to to be able to make this happen?

**Michael Reynolds:** [00:22:27] Sure. So there's a couple of different ways I could interpret buy in, one could be the money spent to invest in equipment two could be kind of the mental load of creating. It's all kind of addressed both quickly. So the the mental load of it, I think it's important to have a clear format. In my mind there are kind of a handful of formats you can do. There's the solo narrative like the monologue format, which is typically what I do. I have some variation with the guests, but generally I do a monologue format. There's also the interview style where you bring on a guest every time and an interview, or there's the co-host like Trishul and Aaron do which is kind of a radio show style format, which can be a lot of fun. Those are kind of the three general formats I see. So I think it's important to pick

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one that resonates with you. If you're someone that is very comfortable talking about something for 20 minutes and just kind of presenting like you're speaking at a an event or something than the monologue format, I think is great. It's also the most low maintenance because you only rely on yourself and other people. If you're-if you're more comfortable asking questions and kind of listening and learning, then the interview style can work really well. The burden is you just have to find guests and keep a regular queue of guests lined up and then the radio show style format of the c-ohost style like Trishul and Aaron do is awesome. It's a really great format. And that's what I did in my marketing agency with a co-host, because you've always got someone to bounce stuff off of. It's more conversational. You have to rely on bringing in a queue of guests. You always have two people that are committed every time. And so that could be fun, too. So I say kind of pick whatever format makes sense. And I've done different podcasting in previous lives, different formats for the actual agenda too. It can be just a simple one topic format, or it can be like a radio show style a while back where it's like, hey, we had an intro and some stuff and we had the main topic and then some like quick dip stuff at the end. And you can do a lot of fun stuff with your format as well. So I'd say pick a format that's comfortable and experiment too. You can play around with formats until you find one that works for you. And this is a good time to mention that when you first start podcasting, the first 10 episodes are going to just be okay with it. Just deal with it. My first 10 episodes are, I think, pretty much of any show I've ever done, and they kind of sucked. And then I got my feet wet and got my footing and then they started being great after that. So don't be afraid to just get it out there, make it mediocre for the first few episodes, get your feet wet, kind of find your footing and just push through it and eventually you will feel super comfortable in your podcast will be awesome because you've pushed through those first few episodes on the hardware side, I can talk all day. I'm going to try to keep a super brief if you're just starting out and don't want to do a bunch of research and go

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down the rabbit hole of hardware and software, just use Zoom with a guest if you're doing a guest or co-host, and then just record it on Zoom and then splice the music the beginning of the end and call it a day. Host it on SoundCloud or Spreaker or something inexpensive. Totally fine. If you want to go as far as I've gone and have a lot of fun with it. I use the RODECaster Pro studio. It's about six hundred dollars and it is worth every penny and then some. I'm like super bullish on this. I have a pod mic which I'm speaking in right now, some headphones and that format is amazing because you can load your music in, press the music at the beginning, splice everything together all at once, pop your SD card in, upload it, you're done. And the sound quality is awesome. So it just makes podcasting really, really easy. If you're just doing a solo episode as well, you don't want to go that far. Just use any kind of sound recorder and even your iPhone recorder is fine. So there's a lot of ways you can approach it. You could spend zero dollars, you could spend a thousand dollars. It's got -

**Maddy Roche:** [00:25:41] Awesome. Yeah, I love that. That commentary about your first episodes are going to be rough. I always imagine that. Same with blogging. I would feel like my first ones were the best and then no one would go back to listen to them and then they would get worse as time went on. But it sounds like you improve every time. Trishul, what-what were you and Aaron thinking about in terms of as you started this? What what kind of technology, what kind of format and structure were you putting around adding this component to your business?

**Trishul Patel:** [00:26:11] Yeah, so as Aaron mentioned, we initially just started recording and then we started learning on the fly on how to actually get the podcast finished, wrapped up, edited and produced and whatnot. So I think after about eight weeks, we realized, okay, maybe we should get

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these out there. It seems like we're doing this enough so that it's probably worth getting out there and for the actual production itself. So we bought a domain name. We use Buzz Sprout for the hosting and then for the editing. And what we did is there's a free program called Audacity and allows you to pull in the file that we recorded. And initially I used to spend a lot of time editing and kind of looking for every little sound or mouse chirping and then the next house down the road and any little blip. But then I started realizing it's really just about getting a smooth conversation. You can really just edit out the beginning in the end and just let the middle kind of flow so that that's actually become a lot more easy once things got more routine. And then with audacity, what you can do is you can apply filters to take out some background noise, make the sound more uniform and normalize. So that actually helps a lot, the technology can do a lot for you pretty easily. So once you have that done, we actually recorded an intro and outro and we use that same thing. We use Audacity to kind of splice it together and that lets us have the episode as one full file and Aaron the rest in terms of uploading it. And we just repeat that process week after week.

**Maddy Roche:** [00:27:41] Wow, Aaron, what's the time commitment and producing a podcast weekly?

**Aaron Agte:** [00:27:46] Probably. Definitely at least two hours, definitely not longer than four. We get to kind of like what Michael's talking about, like we realized pretty early on. We, Trishul and I originally were trying to alternate kind of starting the episodes and introducing it, but I was just a little more comfortable with that. So now, I start out each episode. I write out the summary that will go on and it gets on buzz sprout to iTunes and all the other podcast providers. So I kind of write the content part, Trishul will record his voice, reading what I wrote. So it's kind of like we are, we got we

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listen to Michael Kitces. And so that was kind of a big inspiration for that format of that intro. Another woman from our mastermind groups recorded the-the canned intro that goes with every episode over the music. So I'll write the summary, he'll record himself, put together the audio file. He uploads it to the Google Drive that we share. And then I will go in and upload those to Buzz Sprout and other tags and other things like that. So the recording is usually going, at least forty five minutes, probably on a scale like an hour, hour twenty between like us planning what we're going to say recording conversation and are like, what are we gonna talk about next week. And then between writing the summary and uploading, I probably added another hour, hour and a half. So my guess would be on average, about three hours a week.

**Maddy Roche:** [00:29:16] Hey, that's not a bad lift. Michael, how many hours a week are you spending on your podcast?

**Michael Reynolds:** [00:29:21] One hour or less. Because I just go editing, I-I-I'm kind of a productivity enthusiast to an extreme sometimes. And so I'm always looking for efficiency. And so I with the RODECaster Pro, it's really nice because you just, the music is already baked in. So when I start an episode I hit record and I play the intro music and it's already going in the track right there on the sound or the SD card. And then I start talking, do my voice over, do the episode and then start the outro music when I'm wrapping up, faded out, hit off on the record. And when that happens, I'm done. I basically just take the episode, put it on my laptop, uploaded to Spreaker, post on my website. I'm done. So not one's comfortable with that because I know some people like to have the luxury of editing, which makes a lot of sense, I know. But I just I like to save time. I like to be organic and natural and I do zero editing. So if I say something kind of

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dumb, I just laugh at myself and move on and I'm like, my audience is going to deal with it.

**Maddy Roche:** [00:30:15] Yeah.

**Michael Reynolds:** [00:30:15] I have yet to have to edit anything. Plus, I also do it as a live show. I do it as a Facebook live slash YouTube live. So I have a an appointment every Tuesday at one thirty on my calendar and that's my, that's my show. So that's kind of my carved out time. So I know that every Tuesday I'm going to go live at one thirty. I use Stream Yard to stream the episode to Facebook live and YouTube live and I hit record. I do the episode and then when I'm done it's done. So that kind of forces me to just stay on top of it and not drag my feet because I've got that time carved out. I have people that actually do come live and ask questions. And so I missed last week or this week that we're on now because of the snow and child care situations. Kind of disrupted my week little bit. But generally I'm out there every week and my audience knows that a handful of people show up and ask questions on the Facebook live and those comments. So that keeps me pretty efficient.

**Maddy Roche:** [00:31:07] Oh, awesome. I love that. And that is a benefit of having a solo show, where you don't have to do that editing as frequently as you do, if you've got shared voices and things -

**Michael Reynolds:** [00:31:17] you can have a co-host as well. In my-my marketing agency days, my co-host and I still did it live. So they can work.

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**Maddy Roche:** [00:31:23] - Oh, I love that. -

**Michael Reynolds:** [00:31:24] with guests, it can work with guests too.

**Maddy Roche:** [00:31:26] - That's great. And I appreciate you bringing up how you build time in for it each week because, you know, one of the benefits of being your own business owner is that you get time flexibility and the idea of committing to something on a weekly basis, even now to me and I don't own a business feels a little too much, I don't want to commit to anything every week. But how do you build that Trishul into your business and structure it around your your week?

**Trishul Patel:** [00:31:50] Well, it's one of the few commitments that we try to stick through weekly. But Aaron and I are pretty flexible. We realize, you know, today is a busy week or obviously there's been a lot going on with COVID and handling kids and whatnot. So we can always push it back. And the flexibility comes because we do have a bit of a backlog. We have about four to five episodes ahead of before we release. So now we're recording into like the middle of March, even though it's February. And what that means is if we want to skip a week or two or if we want to do two episodes in a given week, we can do that and just try to keep a little buffer in place so that we have a smoother release cycle. And then, frankly, when we first started, even though we have an episode coming out every week, you can release an episode a few days late and then tag it to the day it's supposed to go out. So that's certainly an option in case you happen to fall behind. Once you get your stuff into a smoother cycle, then we've got a little bit better about that. But things are a bit late. It's okay. We're just learning and getting started and things will get better over time.

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**Maddy Roche:** [00:32:51] You got to tell my editing team that (laughter) you can be late on these things, no. I've always found that keeping up with-with-with the cadence of a weekly one is challenging. And I really have to I have to be super intentional about planning my upcoming months to make sure I've got time to stay ahead with the podcast. One of the things we also think about a lot, and anytime we do something either at XYPN and I'm sure in your businesses is how do we know what's successful? And then I understand the argument that you enjoy it and you like it. And it's just a nice release. Aaron I'm interested, do you track metrics around your podcast to know if what you're doing is actually moving the needle forward?

**Aaron Agte:** [00:33:27] Buzz Sprout does that for us pretty well in terms of letting us know how people have downloaded episodes. Our first episode is still our most popular one. What's the big deal about FIRE? And it's-it's three or four times the number of most other episodes. So what people do-do go back and find that. I don't-I don't know if I have a way of tracking how are people going from the podcast to my website or to finding me like I don't know if I have that, but I think at this stage it's, I'm not, it's almost like if I'm going to keep this weekly commitment of creating content, that's the priority for me at this stage of my business, at this stage of the podcast. If we get to that J curve later on down the road, that-that's great. But it's kind of, I'm not going to consider the podcast a success or failure at this point, even if we have something like 20 to 30 regular listeners, I think that's a very rough number based on the metrics we see. But it's still on one kind of keep, it's almost like a keep our heads down, keep moving forward mentality of no, we're is going to keep recording and we'll check in a year or two later.

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**Maddy Roche:** [00:34:44] Love it. Trishul, any comments on that?

**Trishul Patel:** [00:34:47] Yeah, it's very much strategic. Our goal wasn't to check our progress week after week or month after month, but we might check in more just casually every six months or have a year or check in. When we-when we passed a year, we looked at the numbers again. But again, we're not quite at that J curve yet. So I think once we start hitting that upward slope, which might happen after we hit maybe the two year mark, then it the numbers may be a little bit more relevant. But until then, it's very much just kind of keep at it and take you know, if we build it, they will come attitude towards it.

**Maddy Roche:** [00:35:24] I love it. Michael, one of the things we weigh often as if we're doing this, we're not doing that. And it's just kind of in terms of priorities, what do you feel like you're not doing because you've got this podcast or what have you sacrificed, if that's even the right word for this?

**Michael Reynolds:** [00:35:39] I also don't feel like I've sacrificed anything. If anything, I think it opens up more opportunities for me, because when I have a podcast topic that I've kind of thought through and researched it, it helps me learn as well. Maybe I'm researching a topic that I'm going deeper on and opens my mind to stuff, too. And so it also kind of sometimes spawns blog articles. So I'm actually I don't blog very often. I'm kind of like Aaron, I don't like to write as much as I like to talk so. So sometimes podcast episodes will turn into a blog post because I feel like a written format of it would also be helpful. And so it creates blog posts occasionally or it leads to other just general opportunities. So I don't honestly, I mean I'm

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sure that literally in the context of time. Yes, that's an hour. I'm not doing something else, but I don't feel like I'm giving anything up. I feel like I am gaining things by spending time on podcasting.

**Maddy Roche:** [00:36:24] Love it. Trishul it sounds like you go spend maybe 10 percent of your weekly hours toward your business doing this. What do you feel like you decided not to do because of the podcast?

**Trishul Patel:** [00:36:35] I think it's similar to what Mike and Aaron have related, I too, what used to be thinking about blogging. And then after the podcast started going the blogging kind of did fall off a good amount. And the reason is not necessarily because I didn't like the blogging, but I just enjoy the conversations of that much more. I think part of what Aaron and I have related to each other is it does feel a little bit like therapy, being able to just talk more long format about what's going on with a particular topic without having to keep it at a soundbite. It just kind of gets, gives you the ability to get things off your chest that you just don't have otherwise. So even though that takes an hour to do or two hours to record, end to end, it feels like you get even more benefit out of it than just the time you put into it, beyond just the whatever goes into the podcast itself. And in terms of giving up the blogging, I think it just allowed me the ability to get probably more nuance content out there than I would if I had spent the same amount of time blogging. So I think that's a net benefit as well.

**Maddy Roche:** [00:37:38] Awesome. Awesome. I'm interested in you know, the space has gotten busier over the years. Some people would argue that podcasts market, you know, the podcast market saturated. I'd be

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interested. Aaron, how do you feel like you differentiate yourselves or what's your opinion on there being a lot of podcasts in this space?

**Aaron Agte:** [00:37:57] That's a good question. I had a quick story, I want to relate based on something Trishul said about our conversation feels almost like therapy. I am a huge fan of the Fantasy Football Focused, Fantasy Focused Football podcast with Matthew Berry, Stephania Bell and Field Yates. And he has talked, Matthew Berry has talked about how podcasting is a little bit more of an intimate medium where people are listening to it in their car by themselves. And it's just kind of one person listening to just one thing at a time. You don't really hear people, a couple listening to a podcast together. So it's if it's there in your ears, it's very close. And so there have been enough times with enough episodes that I've kind of pushed Trishul and myself to share personal stories and especially going through COVID, there have been times I like like how are you doing? You know what? This is a pretty hard week. I'm not that great. And so we try to talk about intentional decisions we made in our lives, kind of with our own happiness and well-being in mind, because that's one of the themes of the podcast, is just how to use the money to live the life you want. And I keep there are so many times where it's like I go in. I have had a friend comment on this that you know what, I could tell when you're talking about that topic, you just weren't that excited. I could hear it in your voice. You just there was not the passion. But there's other times where I really enjoy the conversation. I really get into it, maybe laugh a little bit. And I am like thanking Trishul for that kind of the conversation. Like he said, almost therapy. And when I think about the context of other podcasts, I almost don't care. Like I, if there's enough value to me, myself and for the few people who would really relate to me, it's kind of like that, the niche story of XYPN, it's like they really get to know me and if they like that, they'll be hooked. And if it turns them off, that's fine. And so I just I have no idea

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how many podcasts out there, I have no idea how many financial podcasts are out there and I honestly don't care.

**Maddy Roche:** [00:40:06] Yeah. Oh, I love that, that it's actually repelling as many people as it might be attracting for you is an opportunity for them to really get to know you. Michael, I'd love for you to chime in on that.

**Michael Reynolds:** [00:40:16] I could not agree more. In my marketing agency days, I tracked metrics all over the place. I was obsessed with, you know, conversion rates and marketing metrics and sucked all the joy out of my-my work near the end when I was about to sell it. And now I, I purposely don't track anything. Now, I'm not advising that people don't track anything. Some people need to track things and it's different for everybody. But for me, I purposely don't track any metrics. I don't care. Just like Aaron said, I don't care how many podcasts are out there. Don't even know, you know, some of the other players out there. I'm not trying to become a big, huge financial brand or anything. My goal is, I have really two goals that are one of the same. One is to educate people that need help, and two is to gain clients from it. And there and if I do, those things are the same thing. If I do the first thing, the second thing happens and it does happen. I get people to book meetings on my website all the time and in the like, how did you hear about a section they put heard about you and your podcast or I heard about you on this episode specifically or I love this episode on xyz and I'm getting people that book meetings I've never heard of because they found my podcast and they got to know me over the course of a few months, even sometimes. And when we have the first meeting, like, yeah, I feel like I know you because I listen all these episodes and, you know, I kind of know how you think and you sound like a good guy and it's like, you know, the stuff and kind of align with the way I'm thinking. And so it's-it's I

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mean, it's just it's classic content marketing. Seth Godin has been talking about content marketing for a gazillion years. And this is the simplest form of it. It's you, you teach, you educate, you share value. And the people that that resonates with will find you. And it's a lot more fun for me now in this business not having to track everything, because it just kind of I naturally understand what's happening based on the the actions that are being taken, the feedback I'm getting.

**Maddy Roche:** [00:41:56] Awesome. Trishul, any thoughts on differentiating yourself, among other podcasts out there?

**Trishul Patel:** [00:42:02] I think my thinking is aligned with what Mike and Aaron have been saying. We, I haven't really thought about other financial podcasts and what they do and what they don't do. Maybe the key differentiator that might be there is the fact that we do have a long format where we're not just looking at sound bytes or just the phrases on that you might be able to Google, but just having a more in-depth conversation. So that could be a differentiator. But again, it wasn't more purposeful to be a differentiator or just more. That's what we felt the most comfortable with. That's what seems to work for us, and that's what we enjoy.

**Michael Reynolds:** [00:42:37] I would add one thing on differentiation as well. I know the advisers are listing's I want to kind of share, you know, how you might approach this if you're an adviser thinking of starting a podcast. For differentiation, what I found works really well for me anyway, is to be very authentic and a little bit different with topics. There's no shortage of content out there saying, hey, what does a Roth IRA or how do I use my 401k? All that kind stuff is all out there. But I think it was, I forget the

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marketing expert that said this, but there's a phrase I heard once from someone that said information is everywhere out there. People can find information anywhere. People are craving insights, though. So if you can provide insights, over just information, that differentiates you. So, you know, some examples of topics that have gone over really well recently are, I did one called How to Break Up with your financial advisor because I kept getting clients saying, hey, I'd love to work with you. I need to figure out how to fire my old adviser. And so I had a whole episode telling, hey, if you're going to do this, here's how to do it well and professionally and cleanly and all the stuff. And it was really helpful to a lot of people. I did one recently called Should I Play Around in the stock market? Because Game stock is, a Game Stops everyone kind of talking about it. So, you know, stuff like that where you're providing your insight on a topic is more valuable than just like talking about like here's the information on it. They want your opinion that people want your insight, your opinion, your-your insights around that topic.

**Maddy Roche:** [00:43:59] Oh, that is such a good point, and Aaron I loved your point about this being an intimate medium and I'm interested Trishul, have you been a long time listener of podcasts and if so, is there one or two that you'd be willing to share with the listeners that you've always plugged into that maybe join you while you're vacuuming and doing the dishes?

**Trishul Patel:** [00:44:17] I think I have been a long time listener. It's a medium I've enjoyed for many, many years. I think early on there were more science related, but then I kind of branched out. I've always enjoyed like episodes from This American Life and just provide some insight into non-financial topics and non-science topics. But then I do have a few

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science ones that I tend to follow, Quirks and Quarks is another good one. And then there are a few other ones that are on cosmology that I follow as well. So not necessarily finance. I actually haven't listened to a finance podcast yet, except for maybe a Kitces episode here and there when I want to dig into a topic.

**Maddy Roche:** [00:44:55] Awesome, awesome. Aaron, how about you? It sounds like you're a football fan. Any other podcasts you listen to regularly?

**Aaron Agte:** [00:45:03] I have enough podcasts that I really enjoy that I now have to be selective about which episodes I spend my time listening to. Michael Kitces, #XYPNRadio are two big ones. Freakonomics, Malcolm Gladwell, Revisionist History are a couple I like. On the football side, Robert Mays is, has been podcasting for a long time, first with Grantland and the Ringer, now the athletic Bill Barnwell. So I think more people I really enjoy the ads that that intimate aspect like it's I think of Robert Mays, Bill Barnwell, Mina Kines on the football side. I don't know the names of their shows. Yeah. So those are the things I kind of enjoy. Like, do I like the person and their opinions and Michael Kitces, Malcolm Gladwell, like like that tends to be the theme of the podcast. I listen to.

**Maddy Roche:** [00:45:50] Absolutely. I was talking to a friend recently and she mentioned that she had been a long time listener of actually a football podcast and one of the hosts recently passed away and she really was impacted by that. And she-she said that a lot of the listeners were. And I think that just as a testament to the type of medium this is, that you really do begin to know and care about the people that you're listening to. That-that idea of it being intimate is just really ringing true that you do begin to

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get to know people through that. Michael, do you-do you have people that you listen to regularly that inspire you in your work?

**Michael Reynolds:** [00:46:22] I love Kitces and Carl. I like Kitces short and super conversational and casual. I love that style. I also like the Kitces podcast, but I have to set aside like an hour and a half. I can focus. So they're cued up a little bit and also #XYPNRadio of course. And these aren't really like personality brand specific, but I like the Wall Street Journal Money Briefing. I like the Journal from Wall Street Journal. I like The Daily from New York Times. I like those because I like to stay informed on stuff my clients are going to ask me about. And just kind of knowing what's going on in the economy, in the world is helpful to kind of just keep up to date on things like that, too. So I like those sources.

**Maddy Roche:** [00:46:57] I love that. This interview has really shed some light on the diversity of the type of podcast and approach that you can take? Aaron, I'll start with you as we round this podcast out. I can't believe we're already practically done but if you're speaking directly to our listeners who are maybe on the fence about starting a podcast, any final tips for them in their venture?

**Aaron Agte:** [00:47:16] I, like Michael said, kind of like the first 10 episodes might suck and you don't even know if you're good at it. You don't even know if you like it. And that's why I push people just start recording, see if you can create the content first. If you like that, then and you can keep that up, then forget the other stuff out later.

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**Maddy Roche:** [00:47:35] Perfect, Trishul?

**Trishul Patel:** [00:47:38] Yeah, in terms of figuring out the other stuff later, it's not too bad. You can check out some of these hosting sites for podcast. And if you just sign up to their newsletter, they have this down to a science every week. They'll tell you what you need to know next. So from that perspective, you'll get it down pretty quickly.

**Maddy Roche:** [00:47:53] Oh, that's such good advice. That's such good advice. Michael?

**Michael Reynolds:** [00:47:58] I agree completely with Aaron and Trishul and I'll add one more thing, which is to commit to weekly. When I see people podcasting the-the most common thing I see that trips them up and cause them to kind of fall and fizzle out as they-they don't make it weekly. They say, well, I'll do what I can. I'll do it every couple of weeks, maybe I'll do one monthly, maybe I'll do it sporadically. And they fizzle out without fail. So the most important thing you can do for your podcast is to set an appointment every week, get one published every single week, make that a hyper committed focus to get one out the door every week. Because when people listen to your podcast, they-they get into a weekly rhythm. If the podcast is sporadic, they're going to lose interest if it comes out every week. I mean, you can miss a couple here and there, but generally, if it's out every week and they can rely on it, it becomes a habit for people and they really start to get attached and loyal to your podcast. So I am super bullish on commit to weekly without fail.

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**Maddy Roche:** [00:48:49] Very good advice. Let those listeners look forward to the next episode. Well, in efforts to respect our listeners on #XYPNRadio, I've committed to keeping these podcasts just a little bit shorter than Alan used to somewhere in the realm of forty five minutes to 50 minutes. So we are approaching time, my friends, but we could talk for a lot longer than this. Aaron and Trishul and Michael, what a pleasure to chat with you today. Thank you so much. I can't wait to tune into your podcast, folks. Be sure to check the show notes out and become avid listeners of these awesome advisor's podcasts. Thanks so much.

**Aaron Agte:** [00:49:20] Thanks.

**Michael Reynolds:** [00:49:20] Thanks.

**Trishul Patel:** [00:49:20] Thanks, Maddy.

**Maddy Roche:** [00:49:24] Avocado toast, selfies, a mountain of student loan debt. Gen Y is anything but traditional, and with over seventy five million people, it's a population you don't want to ignore. Learn more about how to serve this unique population in our guide called Attract and Profitably Serve Millennial clients in your RIA. Discover three key ways to tap into the millennial market and six things that they want from their financial advisor. Visit XYPlanningNetwork.com/Millennials for your free copy.

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**Maddy Roche:** [00:49:58] Be sure to join our VIP community at XYPlanningNetwork.com/VIP to hang out with other #XYPNRadio listeners, ask questions for future mailbag episodes, and finally to find a community of like-minded financial advisors. Thank you so much for joining me today. We'll see you next time.

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