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Home About Articles Contac



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Home

About

Articles

Contact

About Us

We are Shane Phillips and Joseph Karl, and together we are the hosts of "Relatable Finance." We have worked together at Provenance Wealth Advisors (PWA) since 2014 and come from similar backgrounds. Both of us are from the Midwest but found our way to South Florida. We played college football (and by "played," we mean we were on the teams), and we both enjoy the financial markets enough to have spent the time to obtain the Chartered Financial Analyst (CFA) charterholder designation.

With some help, we had the brilliant idea to start a finance-based podcast to share our knowledge with you. Our goal with each podcast is to simplify important concepts we use daily, explore the various financial risks and opportunities individuals face throughout their lives and provide perspective on current events in the financial world.

We release episodes every other week. They can be found at the link above.

We hope you find our podcasts interesting and informative and welcome any feedback. Enjoy!



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