

NEWS

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New Exec Education Course to Prep Next Gen to Lead Planning to Dick Wagner's Vision

'Planning for the Future of Financial Planning' Course led by Luminary Faculty of Planners and Educators; Yeske, Kahler, Jetton, Levin, Moore, Stearns and Millar

Washington, D.C., May 1, 2023 – A new course, believed a first, will prepare Next Gen planners to lead financial planning and wealth management forward as thought leader Dick Wagner espoused. A faculty of planning leaders will 'Zoom' in six classes over six months. The first class is June 20th.

Wagner's seminal article, "To Think Like a CFP" was published in 1990. [FPA Journal - Best of 25 Years: To Think...Like a CFP \(financialplanningassociation.org\)](https://www.fpa.org/journal/best-of-25-years-to-think-like-a-cfp)

The course, 'Planning for the Future of Financial Planning', is offered by the Institute for the Fiduciary Standard under its *Next Gen Leadership Forum*, a group of Next Gen planning leaders who seek to promote financial planning. (See below).

Knut Rostad, president of the Fiduciary Institute, stated, "*Financial Planning* is noble. Planners come to planning to help people. Ironically, many Next Gen planners don't know where planning comes from, how it evolved to be a "helping career", or its serious challenges ahead. This course fills this gap."

Elizabeth Jetton, faculty member and Adjunct Professor at Golden Gate University, said, "In this course, today's visionary leaders and educators illuminate a pathway and framework to a more vibrant, elevated and impactful profession. Grounded in the seminal work of Dick Wagner, CFP, JD, this is a leading edge and transformational course for the next generation of thought leaders and master practitioners."

Hannah Moore, faculty member and owner of Guiding Wealth, "Dick Wagner was a disruptor, a big thinker, and a visionary. This course will give insights and perspectives that will help the next generation of leaders continue to propel financial planning to new heights."

... **More**

Faculty

As of May 1, the confirmed faculty members are:

Elizabeth Jetton, M.Ed., M.S., Financial Life Planning, CFP®
Adjunct Professor, Golden Gate University

Rick Kahler, MSFP, CFP®, CFT-1™, CeFT®
President, Kahler Financial Group

Ross Levin, CFP®
Founder & Shareholder, Accredited Investors

Andrea Millar, RLP®, CFLA, CSA, CPA/PFS
Founder, Andrea Millar Life Planning

Hannah Moore, CFP®
Owner, Guiding Wealth

Dennis Stearns, CFP® ChFC
Sr Wealth Management Advisor, Stearns Financial Group

Dave Yeske, CFP®, Ph.D.
Founder, Managing Director, Yeske Buie

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Institute for the Fiduciary Standard

The Institute for the Fiduciary Standard formed in 2011 as a not-for-profit to provide research and education on fiduciary duties in investment advice and financial planning. The Institute's Real Fiduciary™ Practices represent best practices. See www.thefiduciaryinstitute.org.

Next Gen Leadership Forum

The Next Gen Leadership Forum (NGLF) is a project of the Institute for the Fiduciary Standard. NGLF develops leaders through education and diverse learning experiences. The founding members are:

Anne Marie Ashworth CFP®, Abacus Planning Group
Christine Crigler, CFP®, The Colony Group
Yesenia Realejo, CFP®, Tobias Financial Advisors
Lauren Stansell, CFP®, Yeske Buie
Eileen Stevens, CFP®, CI ReagentAtlantic Private Wealth
Dan Graham, NextGen Planners, United Kingdom

... **More**

Class Schedule and Descriptions

Dates and times for classes in June, July and September are set; dates and times for the October, November and December classes will be set by June 1.

June 20. Class one highlights financial planning's history. Topics to include: the CPA as Advisor, The Advisers Act of 1940, the Supreme Court in decision in SEC v Capital Gains Research Bureau, the 1969 meeting in Chicago and FPA's suit against the SEC's so-called, Merrill Lynch Rule.

Faculty: Dr. Dave Yeske, Andrea Millar
Date, Time: June 20 . 1:30-3:00 PM ET

July 27 . Class two covers the teachings of Dick Wagner by planners who teach and practice his lessons. Topics drawn from Wagner's writings and, especially, *Financial Planning 3.0*.

Faculty: Elizabeth Jetton
Date, Time: July 27. 1:30-3:00 PM ET

September 12 . Class three draws from recent research and literature on planning today -- how planning is defined / delivered, evolving standards and consumer perceptions and satisfaction with planning or advice. The growth of financial therapy and automated tools suggest the greater breadth of planning.

Faculty: Rick Kahler, Ross Levin
Date, Time: September 12 . 1:30-3:00 PM ET

October . Date TBD. Class four drills down on the myriad of threats and opportunities planning faces. Topics include consumer behavior, advice and planning environment and regulation. Product sellers v. advisors; automated tools; increasing, democratizing access to advice/planning to all consumers.

November . Date TBD. Class Five introduces strategic planning elements for firms, developing professions and nations. What it is and what it's not. From Mark Tibergien to Michael Porter.

December Date TBD . Class Six Participants present strategic planning papers.

Registration Information

- Registration is limited to 20 participants. Participants will attend and complete work in teams of two. Participants may, but are not required to, register as a team.
- Classes will have readings, provided by faculty, to be listed on Fiduciary Institute website.
- NAPFA, FPA, AICPA, CFPB, CFA Charterholder, Next Gen advisors, planners will be invited.
- Classes stress discussion of the faculty presentations and readings. Teams will write 5-page strategy papers to be presented in the final class and evaluated by Institute advisors.
- A course certificate will be offered for successful completion.
- There are two fee schedules. For participants who are members of the Institute for the Fiduciary Standard, the fee is \$150. For other participants the fee is \$350.
- To register and for further information, contact: Knut Rostad at Knut@thefiduciaryinstitute.org