INSTITUTE FOR
THE FIDUCIARY STANDARD

NEXT GEN LEADERSHIP FORUM

'Planning for the Future of Financial Planning': June – December 2023

Featuring Luminary Faculty of Planners and Educators; Dave Yeske, Rick Kahler, Elizabeth Jetton, Ross Levin, Hannah Moore, Dennis Stearns and Andrea Millar

Course Readings *

June 20 . History of Financial Planning**:** Yeske, Millar

A Concise History of the Financial Planning Profession | Financial Planning Association

FPA Journal - Best of 25 Years: To Think...Like a CFP (financialplanningassociation.org)

Layout 1 (fpaofphoenix.org) ('To Act Like a CFP')

CPAs It's Complicated.pdf

AICPA PFP Division 25th anniversary.pdf

Key Points on the History of CPAs as Financial Planners.pdf

July 27 . The Teaching of Dick Wagner*:* Jetton

Financial Planning 3.0: Evolving Our Relationships with Money, Richard B. Wagner (Selected sections).

Integral Finance: A Framework for a 21st Century Profession

Anatomy of an Exquisite Meeting

Moving from Financial Planning to Financial Life Planning

September 12 . Financial Planning Today: Kahler & Levin

6 IFS Informed Financial Therapy™[1], "It's Not About the Money", Rick Kahler
For more information, www.IFSInformedFinancialTherapy.com

October 5 . Financial Planning Threats and Opportunities Ahead: Stearns

https://blogs.hightoweradvisors.com/stearns/wp-content/uploads/sites/22/2017/09/JFPInterview.pdf

https://www.thinkadvisor.com/2023/04/21/kitces-4-trends-reshaping-financial-advice/

https://www.gartner.com/en/articles/9-future-of-work-trends-for-2023

https://www.mckinsey.com/featured-insights/mckinsey-explainers/what-is-the-future-of-work

November TBD . How Do We Get There?: TBA

December TBD . Planning for the future of Financial Planning: Moore

* List as of June 23. Additional readings are expected to be added

* * *

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.
For further information, contact: Knut Rostad at Knut@thefiduciaryinstitute.org

Revised 6.20.23