

NEWS

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New Course to Prep Next Gen Planners to Lead 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, Palazzolo 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**

**Updated July 5. Class descriptions, faculty members and registration information.*

Class Descriptions

The course objective is to equip the next generation of financial planning leaders with the skills and knowledge to think and act strategically to move the field of financial planning towards Dick Wagner's vision for the profession. This is a survey course that offers a working understanding and practical advice for planners to help lead their firms and planning.

The first five classes cover the history and evolution of planning, Wagner's vision, the state of planning today, the threats and opportunities in the future, and the structure and elements of planning and actions to move planning forward. In class six teams of three students discuss their papers.

Classes are "Zoomed" from 1:30-3:00 PM ET on the following dates.

June 20 . History, evolution of Financial Planning: Yeske & Millar

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.

July 27 . The Teaching of Dick Wagner: Jetton

Class two focuses on defining Financial Planning 3.0 and its meaning in the work of practitioners; what is Finology and how does it provide our profession with a metatheory and framework for financial planning as a true helping profession; the theory of integral finance as a way to frame the 4 aspects of our engagement with clients to make the most significant impact.

September 12 . Financial Planning Today: Kahler & Levin

Class three draws from recent research and literature on planning today – how it's defined / delivered, evolving standards and consumer perceptions and satisfaction with planning. The growth of financial therapy and automated tools offer two examples the new breadth of planning.

October 5 . Financial Planning Threats and Opportunities Ahead: Stearns

Class four drills down on the myriad of threats and opportunities planning faces. Topics include client aging issues, how discontinuous change will complicate behavioral finance challenges, disruption of client careers and businesses (potentially disrupting savings patterns), changes in investing strategies and increasingly powerful technology (including AI) in the hands of both advisors and consumers.

November 7 . How Do We Get There?: Palazzolo

Class Five addresses ways Next Gen planners can help move planning to professionalism. The strategies? New thinking on / delivering planning? Re-focusing on new services? Clients? New education? Working through their firm or a planning association? Starting a new group?

December 6 . Planning for the future of Financial Planning: Moore

Class Six concludes the course. Students will discuss their papers, “How Do We Get There?”.

Faculty

The 2023 faculty members are:

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

[Elizabeth Jetton, M.Ed., CFP | LinkedIn](#)

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

[Rick Kahler, MS, CFP®, CFT-1™, CIFSP, CeFT® | LinkedIn](#)

Ross Levin, CFP®
Founder & Shareholder, Accredited Investors

[Ross Levin | LinkedIn](#)

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

[Andrea Millar, RLP®, CSA, CFLA, CPA/PFS | LinkedIn](#)

Hannah Moore, CFP®
Owner, Guiding Wealth

[Hannah Moore, CFP® | LinkedIn](#)

Anthony Palazzolo
Director of Strategic Planning and Performance Management, Moneta Group

[Anthony Palazzolo | Moneta Group](#)

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

[Dennis Stearns | LinkedIn](#)

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

[Dr. Dave Yeske, CFP® | LinkedIn](#)

Registration Information

- Registration is limited to 20 students. Students will attend and complete work in teams of three.
- Classes will have readings, provided by faculty, to be listed on Fiduciary Institute website.
- NAPFA, FPA, AICPA, CFPB, CFA Charterholder, Next Gen advisors, planners are 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 students who are members of the Institute for the Fiduciary Standard, the fee is \$150. For others the fee is \$350. Payment to: Institute for the Fiduciary Standard, P.O. Box 3201, McLean, Virginia, 22103.
- For further information, contact: Knut Rostad at Knut@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 RegentAtlantic Private Wealth
Dan Graham, NextGen Planners, United Kingdom

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.
