INSTITUTE FOR
THE FIDUCIARY STANDARD

NEXT GEN LEADERSHIP FORUM

NEWS

CONTACT: Knut Rostad
301-509-6468 . Knut@TheFiduciaryInstitute.org

Course Preps Future Financial Planning Leaders in Dick Wagner's Vision – Registration Now Open

'Making the Future of Financial Planning' Course led by Luminary Faculty: Evensky, Holland, Jetton, Kahler, Levin, Millar, Moisand, Solin and Rostad

Washington, D.C., April 16, 2024. The Fiduciary Institute announces its 2024 course to help planners lead financial planning and wealth management forward as leader Dick Wagner espoused. Faculty will offer six classes remotely over 14 weeks, starting June 25th.

Envestnet is a co-sponsor of the course. Registration is now open: info@thefiduciaryinstitute.org.

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) The course, 'Making the Future of Financial Planning,' is offered by the Institute for the Fiduciary Standard.

Knut Rostad, president of the Fiduciary Institute, stated, "Dick Wagner believed financial planning can be 'The most important authentic profession of the 21st century.' We need leaders who can make it happen. This course will help them."

Elizabeth Jetton, faculty member and Adjunct Professor at Golden Gate University, said, "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."

The course premiered in 2023. **Mark Rosinski**, Kotys Wealth Professionals, says, "I took the course to be better prepared to advance financial planning. The faculty is a fiduciary 'Dream Team.' Each class offered wisdom, experience, and real-world examples on what it means to live the fiduciary standard.

Envestnet Co-sponsors the Course

The Institute for the Fiduciary Standard is pleased to announce that Envestnet, a leading provider of integrated technology, intelligent data, and wealth solutions, has agreed to co-sponsor the 2024 course.

Dana D'Auria, board member for The Fiduciary Institute, and co-chief investment officer and group president of Envestnet shares her support for the program. "Envestnet is committed to leading the growth of wealth managers and fostering next generation talent in our industry, by bridging the gap between academia and the industry. We are proud to support the course, which is offered by an Institute with a proven track record of passionate support for the registered investment advisor and financial planning community."

Harold Evensky, a consultant to Envestnet | MoneyGuide and a faculty member for the 2024 course, added "Envestnet and the Institute for the Fiduciary Standard are committed to educate and mentor the next generation of financial planners. This course lays the groundwork for future financial planners in America to uphold Dick Wagner's legacy while proactively meeting the evolving needs of clients."

Making the Future of Financial Planning Course Designed for Future Leaders

"Making the Future of Financial Planning" is for the next generation of financial planning leaders. The course is taught by veteran planning leaders and subject matter experts who will provide the knowledge and insights planners need to think strategically to advance Dick Wagner's vision for planning.

Class Schedule Online classes will be held at **1:30-3:00 PM ET** on the following dates:

June 25 **The Teaching of Dick Wagner*:* Jetton**

The first class provides an overview of Wagner's *Financial Planning 3.0*, defining Finology and how it provides our profession with a metatheory and framework for financial planning as a true helping profession. The class covers the theory of integral finance to frame the four aspects of our engagement with clients to make the most significant impact.

July 17 **Evolution of Financial Planning: Evensky and Millar**

Class two highlights planning's evolution from CPA and CFP perspectives. Topics include the CPA as Advisor, the Advisers Act of 1940, SEC v Capital Gains Research Bureau, the 1969 meeting in Chicago and FPA's historic victory over the SEC.

August 6 **Financial Planning Today and Tomorrow from Two Innovators: Kahler and Levin**

Class three draws from the experience of two leading planners shaping their practices and the evolving profession. The growth of financial therapy and the meaning of "independence" offer two examples of the new breadth of planning.

August 27 **Getting There in Real Life: Holland and Moisand**

In class four, two industry leaders offer their experiences and advice in Q&As on how next gen planners can move planning forward. Learn the strategies and tactics they used.

September 12 **The State of Fiduciary Advice in Regulation and Practice: Rostad and colleague**

Class five drills down on the state of the fiduciary standard and the threats and opportunities in leading planning and advice forward.

September 30 **AI and Financial Planning: Dan Solin**

AI. What if the experts are right and AI will match the intelligence of any person next year or shortly thereafter? A realistic assessment of AI's impact of on financial advisors.

The 2024 Faculty

Harold Evensky, Founder, Evensky & Katz / Foldes
Harold R. Evensky | Evensky

Cheryl Holland, Founder, Abacus Planning Group
Cheryl Holland, CFP ® | LinkedIn

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-I™, 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

Daniel B. Moisand, CFP ®
Dan Moisand | Moisand Fitzgerald Tamayo

Dan Solin
www.DanSolin.com

Knut Rostad, MBA
Founder, President, Institute for the Fiduciary Standard

Registration Information

- Registration is limited to 24 students. Students will attend and complete work in teams. Teams will be evaluated based on their five-page paper. Authors of successful papers will receive a course certificate. The first class is June 25th.
- Classes will include readings, provided by faculty, to be listed on the Fiduciary Institute website.
- NAPFA, FPA, AICPA, CFPB, CFA Charterholder, Next Gen advisors, and planners are invited.
- Classes stress discussion of the faculty presentations and readings. Optional: Paper themes will be presented and discussed by all students in an extra class.
- There are two fee schedules. For students who are Institute for the Fiduciary Standard Real Fiduciary™ Advisors, the fee is $275. For others the fee is $425. 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
Mark Rosinski, CPA, CFP®, Kotys Wealth Professionals
Lauren Stansell, CFP®, Yeske Buie
Eileen Stevens, CFP®, CI RegentAtlantic Private Wealth

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.

****