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We recently read "Financial Planning 3.0—Evolving Our Relationships with Money" by Richard B. Wagner. Wagner

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was one of the genuine original thinkers of the financial planning profession. In over 30 years, Wagner, George Kinder, Roy Diliberto, and a small group of other advisers conceived the financial life planning movement and expanded the frontiers of an emerging profession.

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Date: June 28, 2016 Guest Speaker:

Richard Wagner, JD, CFP, Founder of
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Host: Kristin Keffeler, Principal, Kinetic
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Michael Kitces is Head of Planning Strategy at Buckingham Wealth Partners, a turnkey wealth management services provider supporting thousands of independent financial advisors.. In addition, he is a co-founder of the XY Planning Network, AdvicePay, fpPathfinder, and New Planner Recruiting, the former Practitioner Editor

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Fortunately, Wagner was able to publish his book, “Financial Planning 3.0”, just a few months before he passed away, and in today’s weekend reading, we highlight what many view as the seminal article

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on how financial planners must evolve to truly become a recognized profession... an article he first published in the Journal of Financial Planning in 1990, that we are all collectively still trying to live up to today.

Weekend Reading for Financial Planners (Apr 1-2)

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With personal financial planning issues evolving in an increasingly challenging environment, it is becoming much more difficult to keep up with these important and timely changes. CPAs need to be in tune with the many new approaches needed in this continually changing environment. Part of the CPA's challenge is to help clients stay on top of their

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