# NEWS

For immediate release

**Media Contacts:**
Leesy Palmer or Jonny Swift
Impact Communications, Inc.
800-974-7753
ImpactMediaManager@ImpactCommunications.org

# Alliance of Comprehensive Planners Announces Dates and Location for 2022 Annual Conference

## *ACP Members Linda Leitz and Ross Schmidt Receive Prestigious Honors at 2021 Annual Conference*

**WILMINGTON, NC [January 11, 2022]** – The Alliance of Comprehensive Planners (ACP), a community of tax-focused financial planners who provide comprehensive wealth building strategies for their clients on a commission-free retainer basis, today announced dates and location for the 2022 ACP Annual Conference, which is now scheduled for Sept 28 – Oct 1 and will be held at the Hilton Minneapolis in downtown Minneapolis.

The ACP experienced good attendance at their in-person conference held October 25-28, 2021 at the Atlanta Marriott Marquis, with more than 100 members and guests in attendance. Three featured speakers set the tone for the attendees, providing insights on working with clients, the psychology of money, and tools for ongoing success. The ACP also conferred two awards to two certified members of the organization.

**AWARDS OF EXCELLENCE**

Two awards were presented to certified ACP members at the conference: the **Bert Whitehead Visionary Award** and the **Stewart Farnell Award for Excellence in Mentoring.**

The Bert Whitehead Visionary Award, which was created in honor of the founder of ACP and bears his name, serves to recognize an advisor who exemplifies the ACP methodology and successfully utilizes its principles, demonstrates vision and innovation in the financial planning field, and has made significant contributions to the growth and well-being of ACP as an organization. Linda Leitz, CFP®, EA, Ph.D., CDFA, Peace of Mind Financial Planning in Colorado Springs, Colo,. was the recipient of this prestigious award.

"Linda has been instrumental in training others in the ACP System and worked with ACP training guru John Einberger to formalize the Group Instruction program. She is currently chair of the Training Committee and has served ACP in numerous other capacities, including mentoring new members, talking to member prospects, and contributing as an ACP media spokesperson. She generously shares her knowledge with others on webinars, conference breakout sessions, and the Member2Member discussion forum," said Tim Sullivan, CFP®, EA, and current president of ACP. "Linda is one of those people of substance who makes ACP an important community in the wider financial world. She believes consumers are best served by a strong financial planning profession with rigorous standards, so she donates a significant amount of personal time and talent to organizations that further the profession."

"I came for the training but stay for the community," said Leitz when presented with the award. "The tools and systems are wonderful, but the people are ACP's real value. You cannot put a price on the benefit of having all of your fellow ACP members in your virtual back room."

The Stewart Farnell Award for Excellence in Mentoring is conferred on an annual basis to an ACP member who exemplifies the kind of coaching, mentoring, and support of fellow ACP members for which Stewart Farnell was known. Ross Schmidt, founder Aspen Wealth Planners of Greenwood Village, Colo., received this honor.

"With a commitment to and understanding of the importance of service and mentoring, Ross has always been an active contributor to the ACP community. He has served on the board of directors and on multiple committees, including the committee that planned this year's conference. For many years, he taught new advisors The ACP Way as a Success Program instructor and he has mentored numerous new-member advisors as they worked through their first year of running comprehensive financial planning firms. Ross is exceedingly generous with his time, helping both new and prospective members understand the value of ACP," said Sullivan.

**THREE FEATURED SPEAKERS SET THE TONE**

In addition to dozens of helpful breakout sessions led by some of the sponsors, members and practice management consultants, three renowned speakers shared their perspective with the attendees at the conference.

Dr. Kristy Archuleta, professor in the financial planning program at the University of Georgia (UGA), and licensed marriage and family therapist provided opening comments. In her ACP session, **Financial Therapy 101**, attendees learned how to navigate this intersection by tapping into their clients' strengths and motivations. Advisors left with a solid understanding of the financial planner's role in behavior modification plus two strategies they can implement immediately to help their clients achieve both their personal and financial goals. Prior to joining the faculty at UGA in 2018, she was an associate professor and program director of the personal financial planning program at Kansas State University. A Certified Financial Therapist-I™, Archuleta's research and teaching interests relate to financial therapy, couples and money, and effective mechanisms to improve financial and overall well-being. Learn more about Archuleta at College of Family and Consumer Sciences at University of Georgia.

Kicking off the second day of the conference, Morgan Housel, a partner at The Collaborative Fund and a former columnist at The Motley Fool and The Wall Street Journal, shared his thoughts. In this talk, **The Psychology of Money**, Housel shared four stories that show how to think about risk in a more productive way so that advisors and their clients can make better decisions for themselves. He is a two-time winner of the Best in Business Award from the Society of American Business Editors and Writers, winner of the New York Times Sidney Award, and a two-time finalist for the Gerald Loeb Award for Distinguished Business and Financial Journalism. Learn more about Housel and his work at The Collaborative Fund.

Rick Kahler, MS, CFP®, CFT-I™, CeFT® is a pioneer in integrating financial planning and psychology closed the conference on the final day. In this workshop, **Applying the Tools of the Masters: A Financial Life Planner's Search for the "Killer App" of Life Planning**, Kahler discussed the life planning tools he uses in his practice and resources that he recommends. Kahler is one of the originators of the concept "financial therapy." He has been recognized for his work in this field by InvestmentNews, receiving their 2019 Innovator Award and in 2018 by Bob Veres' Insiders Forum, receiving their annual Iconoclast Award. He is also a founding board member and past-chair of the Financial Therapy Association. His work and research has been featured or cited in scores of national and international periodicals and books. He is in his 30th year of writing a weekly column on personal finance which appears in several newspapers. Learn more about Rick Kahler at Kahler Financial Group.

For more information and to be put on the list for 2022 updates, contact lexi@acplanners.org.

**SPECIAL PODCAST EPISODE AND VIDEOS FROM CONFERENCE**

As a capstone to the 2021 conference, the ACP released a special podcast episode featuring a compilation of ACP Member insights; each member in this episode spoke briefly about a challenge they faced in 2020 and how they successfully moved through and resolved the issue.

In addition, several ACP Members recorded video statements that explain why they became an ACP Member and how much they value the ACP Community.

**To view the video showcase, click here:** https://vimeo.com/showcase/5584561

**To access the podcast episode, click here:** https://www.acplanners.org/media/podcasts

**ABOUT THE ALLIANCE OF COMPREHENSIVE PLANNERS (ACP)**

The Alliance of Comprehensive Planners (ACP), is a community of tax-focused financial planners who provide comprehensive planning strategies for their clients on a commission-free retainer basis. As fee-only fiduciaries, ACP members are required to maintain the CFP® or CPA/PFS (or equivalent) designation and complete ACP's rigorous training program. To learn more about this fiduciary network or to find a certified ACP member, visit www.ACPlanners.org.

The Practical Wisdom podcast presented by the Alliance of Comprehensive Planners and hosted by ACP member Ken Robinson, CFP®, JD, offers an interesting array of ACP advisors sharing stories of how they became successful, fee-only, comprehensive financial advisors. Through these conversations, Practical Wisdom reveals the strategies, tips, and tools these advisors employed to get where they are today. In 2021, WealthManagement.com listed Practical Wisdom as one of the top 15 podcasts for financial advisors. To access these informational Practical Wisdom podcast episodes, click here: https://www.acplanners.org/media/podcasts

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