

# NEWS

For immediate release



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## The Alliance of Comprehensive Planners Announces 2021 Annual Conference Agenda

*Dr. Kristy Archuleta, Morgan Housel and Rick Kahler are keynote speakers at in-person gathering of the ACP slated for October in Atlanta*

WILMINGTON, NC [August 12, 2021] – The [Alliance of Comprehensive Planners \(ACP\)](https://www.acplanners.org), a community of tax-focused financial planners who provide comprehensive wealth building strategies for their clients on a commission-free retainer basis, has announced the featured speakers and agenda for their in-person conference this fall. The event will be held October 25-28, 2021 at the Atlanta Marriott Marquis.

The agenda is available here: <https://www.acplanners.org/2021acpannualconference/agenda21>.

## HOW TO PARTICIPATE

Participation is open to all interested financial professionals; one does not need to be an ACP member to attend. [Early bird registration rates](#) (which expire October 1, 2021) are in effect now.

Journalists may request a press pass by contacting Leesy Palmer or Jonny Swift at [ImpactMediaManager@ImpactCommunications.org](mailto:ImpactMediaManager@ImpactCommunications.org).

Sponsorship opportunities are available. Interested companies may contact Haleigh Hughes at [haleigh@acplanners.org](mailto:haleigh@acplanners.org).

### **THREE FEATURED SPEAKERS WILL INFORM AND MOTIVATE**

**Tuesday, October 26 at 9:00 a.m. ET**  
**Financial Therapy 101**

**Dr. Kristy Archuleta** is a professor in the financial planning program at the University of Georgia (UGA). She is a licensed marriage and family therapist, and a Certified Financial Therapist-ITM. 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. Her research and teaching interests relate to financial therapy, couples and money, and effective mechanisms to improve financial and overall well-being. She has co-edited two books and published numerous scholarly articles.

Archuleta is a co-founding board member and past-president of the Financial Therapy Association, co-founding editor of the Journal of Financial Therapy, and a co-founder of Women Managing the Farm. She serves on the Board of Directors for the National Association of Personal Financial Advisors (NAPFA), the National Consumer Education Foundation, the Financial Therapy Association Certification Committee, and the editorial boards for Financial Planning Review, Journal of Financial Planning, and Korean Financial Planning Review. She is commonly featured in podcasts and major news media outlets, such as the New York Times, Investment News, and CNBC.

“When financial professionals practice comprehensive financial planning, they are helping clients address all elements of their finances, which means that their work is intertwined with many other aspects of the client’s personal life,” said Archuleta. In her ACP session, Financial Therapy 101, attendees will learn how to navigate this intersection by tapping into their clients' strengths and motivations. Advisors will leave 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.

Learn more about Archuleta at [College of Family and Consumer Sciences at University of Georgia](#).

**Wednesday, October 27 at 9:00 a.m. ET**  
**The Psychology of Money**

**Morgan Housel** is a partner at The Collaborative Fund and a former columnist at The Motley Fool and The Wall Street Journal. 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. He is author of the book The Psychology of Money. Housel has presented at more than 100 conferences in a dozen countries. He speaks about behavioral finance and history, using storytelling to explore how investors deal with risk and how they can think about risk in a more productive way.

“Risk is the most important topic in investing. But it is not simple or intuitive,” said Housel. In this talk, The Psychology of Money, Housel will share 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.

Learn more about Housel and his work at [The Collaborative Fund](#).

**Thursday, October 28 at 10:00 a.m. ET**  
**Applying the Tools of the Masters**

**Rick Kahler**, MS, CFP®, CFT-ITM, CeFT® is a pioneer in integrating financial planning and psychology. 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. He is a distinguished adjunct professor at Golden Gate University, a Finology Fellow, and a past chairman of the South Dakota Investment Council. 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. He is a co-author of four books and a podcast that blend financial planning and therapy.

“With so many financial planning tools out there, it can be a challenge to find the best ones and put them into practice,” said Kahler. In this workshop, Applying the Tools of the Masters: A Financial Life Planner’s Search for the “Killer App” of Life Planning, Kahler will discuss the life planning tools he uses in his practice and resources that he recommends.

Learn more about Rick Kahler at [Kahler Financial Group](#).

**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.

[The Practical Wisdom podcast](#) presented by the Alliance of Comprehensive Planners and hosted by ACP member Ken Robinson, CFP®, JD, recently released their 19<sup>th</sup> episode 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. ACP looks forward to recording another compilation episode at the upcoming 2021 conference. Listen to these informational Practical Wisdom podcast episodes and more here.

To learn more about this fiduciary network or to find a certified ACP member, visit [www.ACPlanners.org](http://www.ACPlanners.org).

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