NEWS

For immediate release

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Alliance of Comprehensive Planners and Kinder Institute of Life Planning Announce Plans for 2020 Conference in Atlanta

Susan Bradley, George Kinder and Dan Roam are keynote speakers at joint gathering of the ACP and Kinder tribes.

WILMINGTON, NC [April 22, 2020] – The Alliance of Comprehensive Planners, a community of tax-focused financial planners who provide comprehensive planning strategies for their clients on a fee-only retainer basis, together with the Kinder Institute of Life Planning, an organization that provides workshops, intensive trainings and consulting services to financial advisors worldwide, have announced the featured speakers and special plans for a jointly-hosted conference this fall. The event will be held October 27-30, 2020 at the Atlanta Marriott Marquis. Early bird registration rates (which expire October 2, 2020) are in effect now. Participation is open to all interested financial professionals; one does not need to be an ACP member or a Kinder-trained Life Planner to attend.

Companies interested in sponsoring the event should contact Jill Colsch at jill@acplanners.org. The agenda is available here: https://2020.acplanners.org/content/agenda2020.

THREE FEATURED SPEAKERS WILL EDUCATE AND INSPIRE

Susan Bradley, CFP®, CeFT®, founder of the Sudden Money® Institute and the Financial Transitionist® Institute will deliver her keynote presentation, *The Implied Promise of Financial Planning which explores* what the implied promises are, who is keeping them, and the consequences of not evolving. Bradley established the Sudden Money® Institute 18 years ago as a “community of practice” seeking to better serve financial planning clients by developing special processes and tools for the personal side of money and for clients going through transitions. This think tank created the Certified Financial Transitionist® (CeFT®) designation, and a division for training and certification called the Financial Transitional® Institute.

"There is implied promise made every time a client signs on or renews with a financial planner," Bradley said. "This promise goes beyond fiduciary commitments, practice efficiency, technology, behavioral finance, and life planning. It says in one way or another, I am your go-to for whatever happens in your life. The profession promises that financial planning makes life better. But are we really keeping the implied promise, or are we just getting better at running the business of financial planning? If we rely on technology and psychometrics to do the real human to human work with clients, we may lose the profession we collectively love and end up with something very different. Evolution will bring us something different than we have today; we get to shape that new form, or not," Bradley said.

Learn more about Susan Bradley and the Sudden Money Institute at www.SuddenMoney.com.

George Kinder, CFP®, Registered Life Planner®, founder of the Kinder Institute of Life Planning, will be doing something historic for this keynote, as he asks Louis Vollebregt, Kinder Institute's Train the Trainer and Europe's premiere trainer, to life plan George, modeling the EVOKE® process in front of the whole audience. Advisors will experience the unrehearsed and intimate unfolding of both Kinder Institute and Kinder's future right before their eyes while learning EVOKE's signature structure and detail.

"We're very excited about this jointly-hosted conference with the Kinder Institute," said Chris Wentzien, CPA/PFS, CFP®, MBA at Natural Bridges Financial Advisors LLC and current president of Alliance of Comprehensive Planners. "On top of that, it is like icing on the cake to have author, speaker, meditation teacher, and father of the Life Planning movement in financial advice, George Kinder, pass his proverbial torch to the Kinder Institute's top trainer, Louis Vollebregt, who will life plan the master. Experiencing the Life Planning process in all its detail and subtlety – watching these two masters reveal it in practice and unravel the elements afterward – will be a remarkable and rare experience."

Attendees can expect to learn, in addition, Kinder's thoughts on the future of Life Planning, the deepest roots of Life Planning in mindfulness, and the greatest extent of Life Planning into a Golden Civilization. Learn more about George Kinder and Kinder Institute of Life Planning at www.KinderInstitute.com/George-Kinder.

Dan Roam, founder and President of Digital Roam, will in his keynote speech, *The Back of the Napkin: Visual Storytelling for the Financial Future*, show advisors how to share financial futures planning through the power of visual storytelling. Using the incredibly simple VISUAL DECODER, advisors will see how to explain complex financial tools to their clients in a way that drives clarity, engagement, and future visioning. "Vision" is an innate human superpower; in this session, advisors will learn to truly leverage it – for themselves, for their clients, and for the future.

"As a marketing professional who's been working with financial advisory firms and members of the ACP for some time now, I am especially excited to learn from Dan Roam," said Marie Swift, founder and CEO of Impact Communications. "Storytelling is an art, but there are formulas and studies to consider that can help us do a better job connection with others as business professionals. Showing and telling go hand-in-hand. Dan's talk will inspire and teach valuable new skills."

Learn more about Roam and his book, *The Back of the Napkin: Show & Tell, Draw to Win*, at www.DanRoam.com.

WORKSHOP ADD ONS ALLOW ATTENDEES TO SHARPEN THEIR LIFE SKILLS

Optional Kinder Institute of Life Planning Workshops will be held before and after the conference at the Atlanta Marriott Marquis. https://2020.acplanners.org/content/workshops

The Seven Stages of Money Maturity® 2-Day Workshop will be held October 26-27, 2020.

This 2-day workshop explores how to recognize the human dimensions of money such as self-sabotaging behavior, inappropriate risk-taking, lack of interest in executing a plan, and goal confusion—and how to address them. Examine beliefs about money that disrupt the advisory process and what to do about it. Advisors learn to inspire clients to action toward their most profound goals, establish broader and deeper relationships with their clients, and experience the integration of life goals with financial realities. Conference attendees and ACP members receive special pricing of $50 off the regular fee when registering for the training using this link.

5-Day EVOKE® Life Planning Residential Training will be held October 30-November 4, 2020.

Advisors who meet certain prerequisites are invited to learn the 5-phase EVOKE® methodology that empowers clients to discover lives of profound meaning and deliver it in short order. Advisors pair up with partners and develop life plans for each other during the workshop. Participants practice the conversation process and receive personal coaching after each exercise. A half-day is spent on basic client interviewing principles, the dynamics of working with couples and families, and conflict resolution. Another half-day is devoted to practice management guidance related to integrating a Life Planning approach into an existing practice. Conference attendees and ACP members receive special pricing of $200 off the regular fee when registering for the training using this link.

PRACTICAL WISDOM PODCAST FROM ACP FINANCIAL ADVISORS

The Practical Wisdom podcast presented by the Alliance of Comprehensive Planners and hosted by ACP member Ken Robinson, CFP®, JD, recently released their eleventh 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. The Alliance of Comprehensive Planners recently released a compilation episode from the 2019 ACP Annual Conference held November 2019 in San Diego, where eleven ACP advisors shared their top tips and words of wisdom to aspiring fiduciary advisors. ACP looks forward to recording another compilation episode at the upcoming 2020 joint conference with the Kinder Institute. Listen to these informational Practical Wisdom podcast episodes and more here.

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 fee-only retainer basis. ACP members are required to maintain the CFP® or CPA/PFS (or equivalent) designation, complete ACP's rigorous training program, and meet some of the highest continuing education requirements in the industry. To learn more about this fiduciary network or to find a certified ACP member, visit www.ACPlanners.org.

ABOUT THE KINDER INSTITUTE OF LIFE PLANNING

The Kinder Institute of Life Planning provides workshops, intensive training programs, and consulting services to financial advisors worldwide. Their experienced professionals have presented to groups on five continents with a particular focus on the U.S., U.K., Europe, and South Africa. They also provide ongoing support and education for the 3,500+ advisors and financial coaches who have trained with the Institute and adopted their client-centered Life Planning methodologies. The Institute founder, George Kinder CFP®, RLP®, is the father of the Life Planning movement and the recipient of numerous awards for leadership in the financial planning industry. He is the author of six seminal books, most notably *The Seven Stages of Money Maturity*, *Lighting the Torch: The Kinder Method of Life Planning*, *Life Planning for You*, *Transforming Suffering into Wisdom: Mindfulness and The Art of Inner Listening*, and *A Golden Civilization & The Map of Mindfulness*. The Institute's work has been profiled in *The New York Times*, *The Wall Street Journal*, *Morningstar*, *TIME* and many more. To learn more about Kinder Institute of Life Planning, visit www.KinderInstitute.com.

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