



# We can change the world

Can financial Life Planners save the world? Sound a bit crazy? Bear with me and see what you think after reading this column. That premise – that financial Life Planners really can save the world if they really rally to the cause – might not seem as far-fetched after you ponder the premise a while with me.

The Chinese philosopher Confucius had a kind of a genius in understanding what was wrong in the society around him. What he understood was that, in a way, the society as a whole was fragmenting. It was falling apart, it was more violent, it was more fraudulent and untrustworthy. What he saw was that a very simple re-direction – both in the

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family and in politics back toward the meaningfulness of those relationships and what gave them meaning – would make a huge difference. For instance: between father and

son, mother and daughter, child and grandparents, between counselors and the king, between the rulers and the people, the people and the rulers, he asked, more or less, what are the obligations and responsibilities going back and forth that really have deep meaning. Once he saw that you could bring society back toward that place of meaning, his boast was “give me three years with the government and I will establish a truly and profoundly stable government”.

Another thing he believed in – and I know we will all say hurrah to this – was that the leaders have to be taught, trained and vetted on their own morality, their own honesty, truth, kindness, empathy, and other virtues. Those were really the most important qualities that a leader had to have. What Confucian society ultimately did, because of that

belief in virtue and the capacity to grasp complex situations, was that they believed in education and in merit as being the way to determine who governed basically. So the rulers from their youngest ages were trained in what it was to be a virtuous person, and the counselors were educated and were chosen based on their merits in terms of both their smartness and their qualities as virtuous human beings. So you had a pretty cool meritocracy.

Think of today’s political races. What if we as a society screened people based on virtue and the ability to grasp complex situations? If we looked at the candidates from a standpoint of character, we would begin to feel that we can believe in the person some way. If we thought that we could trust the person, and we had the feeling that in fact his virtue can inspire many people to move forward, then we would be inspired to support that person.

How does all this relate to financial Life Planning? Well, what we a group have seen in the life planning movement is that there is another way. If we can teach and train and inspire through a model that is convincing, that shows people that their lives could be so much happier and more fulfilled, mapping personal meaning in their lives against money, so that we’re delivering what is meaningful, that becomes a habit that goes everywhere money is encountered. If we model it ourselves as financial planners, we also become the new model. It is in part a spiritual model as well as a practical model for people; certainly a model as a mentor. By really making this model stick, by creating the forms and the structures, I believe we can change the world.

Think of this: the Confucian model went 2500 years. Who’s to say how long our model might last? But it’s a huge contribution to civilization, what it is that we might be able to do.

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