



KINDER INSTITUTE of LIFE PLANNING

Newsletter

November 10, 2005

VOLUME 1, ISSUE 2

And the Beat Goes On...

The past few months have been amazing for the Kinder Institute. George and Susan were in London in July, having just completed a Seven Stages workshop there with 33 planners from the UK and the Netherlands, the day before the bombings there.

Susan led the workshop for the Garrett Planning Network at their retreat in Kansas City in August, while both George and Susan co-led the Seven Stages workshop for 90 attendees prior to the FPA Conference in San Diego.

The end of September, George was the featured speaker in a Fidelity UK "road show" - 7 speeches, 3 workshops, 3 interviews and 7 cities in 5 days! George reports that it was quite a thrill, with wonderfully favorable responses. As a result, over 40 planners are already signed up to take the Seven Stages workshop in London next July.

George then flew to the Netherlands, where Ivo Valkenburg had arranged a Seven Stages workshop for 36 attendees, with major financial companies sending contingents of 5-6 planners each. George came home quite inspired by the high level of interest and enthusiasm in Life Planning in Europe.

First Annual Life Planning Conference Report

More than thirty Kinder-ed Spirits gathered in Estes Park, Colorado from October 14-16 to co-create and participate in the first-ever Life Planning Conference. This year, attendance was limited to those who have participated in the Seven Stages of Money Maturity workshop and other Kinder Institute trainings. Next year, we hope to open it to whomever wants to come, learn and play.

We began Friday evening, getting reacquainted with introductions and some playful community building experiences. Saturday morning, George led the group in intensive case study discussions, and then led a group on what turned out to be quite a hike to Rocky Mountain Park, where the less athletically

Our Life Planning Conference in Estes Park in mid-October was a real treat (see below), with elk congregating all about us, golden aspens and snowy peaks. Then Susan led a 5-day Life Planning training in Estes Park, with Martin Siesta co-leading. It even snowed a bit, just to add to the fun.

The first week in November found George and Ed Jacobson co-leading another 5-day Life Planning training in Massachusetts, with Jake Koebrich (who assisted at both) recording much of the two events, as well as the Conference — sound files to be posted to the Web site in due course.

With Dale Van Scoyk having joined us now as our Relationship Consultant (and training participant), we are excited by all the interest being expressed for trainings in a life-centered approach to financial planning.

George has decided to host up to 12 committed planners in Hana, on Maui, at a 5-day Life Planning Training, January 8-14. What better way to begin your New Year, your New Practice than transforming in paradise? Register before 11/20 for only \$3450.

inclined met them for a box lunch.

Saturday afternoon, Marie Swift and her husband/business partner, Bill, led a very dynamic exploration of the business model for Life Planning, including marketing, publicity, fees, etc.

Saturday evening, Susan led a session that let participants explore what happens at life's turning points, and what is involved in living from the heart.

Sunday morning, Louise Cole's workshop on legacy wills was both powerful and moving, awakening us to how these wills could be transformational now.

As we closed, we agreed: Add a day in 2006!

Calendar of Events

Dec 2-4: Seven Stages Workshop, W. Palm Beach, FL

Jan 8-14: Life Planning Training, Hana, Maui, HI

March 3-4: Seven Stages Workshop, SF Bay Area, CA

March 5-11: Life Planning Presentation Training, N. CA

March 20-25: Life Planning Training, Northern CA

May 22-23: Seven Stages Workshop post-NAPFA, Grapevine, Tx

June : Life Planning Training, N. Andover, MA

July 5-6: Seven Stages Workshop, London, England

Kinder Institute

LIFE PLANNING



bringing life to money™

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Great News About Publicity!

Since the last newsletter in April, there have been some significant advances in our campaign to bring knowledge of Life Planning to the public as well as planners. Here are some of the highlights, and we hope you are getting calls from your directory listing as a result:

- May issue of **Investment Advisor** magazine: George is again named one of the top 25 most influential leaders in financial services.
- July, **Financial Times**, London: “What Do You Really Want?,” above-the-fold feature story by Rebecca Knight on Life Planning and George Kinder, following our Seven Stages workshop there.
- August, **MorningStar Advisor**: “The Evolution of Life Planning,” by David Drucker — an excellent interview with George and Susan, aimed at helping planners understand the Life Planning movement.
- September, **Financial Planning** magazine: George is named to their inaugural “Hall of Fame.”
- October, **Telegraaf** (largest paper in the Netherlands): Front page article, “A Financial Plan to Make Your Dreams Come True,” featuring George and the Kinder Institute, following the Seven Stages of Money Maturity workshop there.
- October, **New York Daily News**: “Getting a Read on Finances,” by Lore Croghan.

The financial press is now paying close attention to the emergence of Life Planning as the newer and more comprehensive approach to financial planning. Working with Marie Swift, our publicist, we hope to gain equal penetration into the awareness of the general public through the mainstream media. Certainly interest is high among consumers, whenever they hear of the benefits of life-centered financial planning. We intend to build that interest, and appreciate it when you let us know that your phone is ringing after articles appear.

New Web site to be Launched

By the time you read this, we should have activated our new Web site design and navigation, which has been in process for several months now. Be sure to check your listing in our directory, and let us know if we need to make any changes or updates. We hope you will like the new look and feel of the site, now that it speaks more directly to the life dreams we hear most often from both planners and clients. Visit www.kinderinstitute.com and let us know what you think!

Rise With the Dawn

*A single voice sings:
I rise with the dawn and
live every breath
I hold out my hand but
touch with my heart
I drink from the cup of
life's laughter and tears
And I bask in the beauty
of the dream that I live*

*I will look beyond faces
and into the soul
I will build the stages for
life's songs to be sung
I will hold the torch high
as life's moments are
claimed
And then I'll let go and let
heaven embrace*


*Then I'll stand in the shadows
and hear choirs
rejoice*

*I rise with the dawn and
live every breath
I hold out my hand but
touch with my heart
I drink from the cup of
life's laughter and tears
And I bask in the beauty
of the dream that I live*

Written by Kathryn Nusbaum at the Estes Park Life Planning Training, October 2005


Create Deeper Relationships with Your Clients...

Become a Registered Life Planner.



George Kinder, CFP®
Author of *The Seven Stages of Money Maturity*

Kinder Institute
LIFE PLANNING



The Kinder Method™
An Intensive Training in Life-Centered Financial Planning

1. **The Seven Stages of Money Maturity®** — a two-day introductory workshop
2. **Life Planning Intensive** — a five-day residential training in the EVOKE™ MODEL
3. **Mentorship** — a six-month practicum for practice integration

NEWS FLASH! The CFP Board of Standards Now Grants
25 CEU's for the 5-day Life Planning training
and 9 CEU's for the 2-day Seven Stages workshop

bringing life to money™

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