



KINDER INSTITUTE
of LIFE PLANNING

Newsletter

March 28, 2005

Volume 1, Issue 1

Have We Got News For You!

Today's story in the Christian Science Monitor "When is Enough...Enough?" (www.csmonitor.com/2005/0328/p13s01-wmgn.html) is just the latest in an exciting flurry of publicity that has recently emerged in both professional and public press about life planning and the Kinder Institute.

Since the first of the year:

- George was honored by *Financial Planning* magazine as one of the "Movers and Shakers" of 2005. The primary honorees — Roy Diliberto, Guy Cumbie, Elizabeth Jetton, Dave Yeske, and Dick Wagner — have all taken the Seven Stages workshop and three (Cumbie, Jetton and Wagner) have taken either 5 or 6-day advanced trainings.
- George was featured in a half-page article in the *Boston Globe*, "Crafting a Financial Plan for the Soul," which led to many calls to planners in our directory in the circulation area of the *Globe*.
- The February issue of *Investment Advisor* magazine featured a chat with George by William Glasgall, "The Next Stage for Financial Planning."
- "O" magazine profiled George in a special issue on finance in March in an article by Lise Funderburg, "How Much is Enough?"
- *USA Today*, in the Life Section on February 23, picked up on the "O" article, and the author, Craig Wilson, zeroed in on George and the power of the Three Questions. This piece was picked up by many local news publications across the country.
- The March issue of *Financial Planning* featured a brief article by George and Susan on Practice Tips: "Improve Your Relationship Skill Set."
- Two new columns are being written by George and Susan. The first is the money column in *Worthwhile* magazine, a new publication for a general audience whose mission is "Work with Passion, Purpose and Profit." Look for the third issue on newsstands soon. The other column, on Money and Meaning, will be appearing regularly in the new *Advising Boomers* magazine headed up by Richard Koreto, formerly Editor-in-Chief at *Financial Planning* magazine. This new magazine is debuting this month (subscribe online at www.AdvisingBoomers.com).
- We are hearing from planners across the country that they are receiving calls from potential clients in their area as a result of all the publicity. Let us know when you are contacted, and what the results of that contact are for you.

We're finding that the public gets VERY excited about the idea of putting life goals and aspirations first in the financial planning relationship, every time they read about it. Our aim is to make sure that they have access to financial planners in their home areas who are fully trained and competent to facilitate a comprehensive financial life plan. While we list all those who have at least taken the 2-day Seven Stages of Money Maturity® workshop in our Life Planners Directory, the fact is that the 2-day is not a Life Planning training per se, but rather the prerequisite for receiving the in-depth Life Planning training provided by the 5-day and the Mentorship.

We hope to provide a national roster of fully-trained financial life planners, with services available in every area, within the next few years. If you have been contemplating going further with your training in Life Planning, now is the time to "catch the wave."

Calendar of Events

- **April 23-24:**
Seven Stages workshop,
California
- **May 2-3:**
Seven Stages workshop,
Maine
- **June 5-10:**
5-day Life Planning training,
Massachusetts
- **July 5-6:**
Seven Stages workshop,
London
- **August 2-3:**
Seven Stages workshop,
Kansas City
- **September 14-15:**
Seven Stages workshop,
San Diego
- **Nov 1-6:**
5-Day Life Planning training,
Massachusetts



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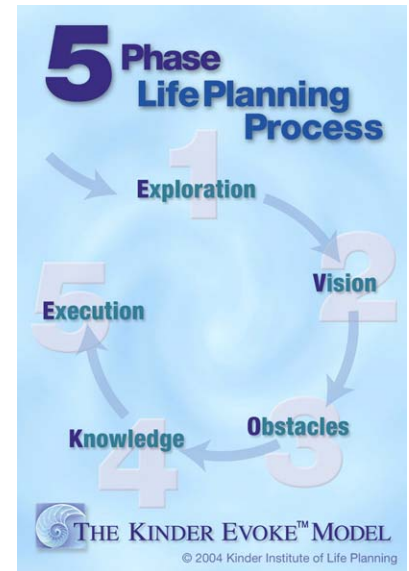
*Bringing Life
to Money*

EVOKE™ in April 2005

Journal of Financial Planning

The April issue of the *Journal of Financial Planning* will host the debut of the first articulation in print of the EVOKE™ model, the heart of the Kinder Method™ of financial life planning. This important article was peer-reviewed before publication. While the article describes the process and phases of the Financial Life Planning relationship and methodology, we know from first-hand experience that it is only in experiencing the methodology oneself that the principles really take root and create an authentic financial life planner. While the concepts are clear, they no more deliver the transformational impact of the process than a recipe provides substance to the body.

In the Life Planning training, planners experience being “life planned” even as they learn how to do it with clients. The combination of being on both sides of the table along with extensive feedback and guidance from instructors and fellow trainees leads to a deep integration of the process within each planner.



Aloha from Hana



On the left: Our intrepid crew from the January 5-day just after New Year's, basking in the aloha of the time shared with participants. This training was led by Susan Galvan, second from right, and co-led by Ed Jacobson, on the left. Able assistants were Suzanne Hodges, center front, and Ray Arata, on the right. And who the heck is that smiling face behind Suzanne, and how did he sneak into the photo? It's Wayne Lear, from Down Under! As you can see, it was a lovely bunch of coco-nuts (*see group photo on the right*).



News Flash!

CFP Board of Standards grants 25 CEU's for the Kinder 5-day *Life Planning training* and 9 CEU's for the *Seven Stages 2-day workshops*.

Create Deeper Relationships with Your Clients...

Become a Registered Life Planner.



George Kinder, CFP®

Author of *The Seven Stages of Money Maturity*

THE KINDER METHOD™

An Intensive Training in Financial Life 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



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