KINDER INSTITUTE of LIFE PLANNING

Newsletter

April 21, 2006 — *Bringing LIFE to Money™* — Volume 2, Issue 1

Flourishing

Are you flourishing in your life—financially, physically, emotionally, spiritually? One of the core aims of our work as Life Planners is to bring more life, to ourselves and to our clients, by facilitating a life—a Dream of Freedom— that is creative, regenerative, and prosperous in every way. The key to flourishing is to access the dormant aspirations of the heart and cultivate the kind of planning process that will bring those aspirations to fulfillment.

Whenever we lead a Seven Stages workshop or Life Planning training, we find it is the "heart stuff" that emerges most powerfully. It emerges BECAUSE of the interaction between two people when there is true listening and genuine empathy being shared.

At our most recent Life Planning training in Northern California, all the planner-participants were in one form or another of life transition. As is often the case, they had been listening to their heads and all their cautionary thoughts rather than accessing their hearts. By the end of the five days, they had learned the skills and methodology of Life Planning; AND each had found a new understanding of where they wanted their life transition to take them. As one participant said, at the end, "It was the heart thing that I was missing."

We all know that a life worth living isn't really about the money, even though money always plays a role. As a planner, it is critical for you to have moved through a life transition of your own by being "life-planned." Having experienced all the highs and lows of charting your own life path, while warmly and wisely supported by the relationship with your own planning partner, you can then truly empathize with your clients as they move through their own life planning processes. You can also then convey that authentic confidence and excitement about the outcome that only comes from those who have walked the walk themselves and are now flourishing as a result.

George will be teaching the next 5-day Intensive Life Planning Training near Boston, June 12-17. Don't miss this rare opportunity to be trained the EVOKE methodology by George, in the company of great planners. Register NOW for $3450.

Calendar of Events

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

June 12-17: Life Planning Training Intensive, N. Andover, MA

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

July 25-26: Seven Stages Workshop, Garrett Retreat, Kansas City, KS

Oct 19-20: Seven Stages Workshop, FPA, Nashville, TN

Nov 9-12: Life Planning Conference II, Estes Park, CO

Nov 12-17: Life Planning Training, Estes Park, CO

Second Annual Life Planning Conference Set

This year's Conference has added a day at the request of last year's participants, so mark your calendars now for November 9-12. We will be returning to the YMCA of the Rockies in Estes Park, CO.

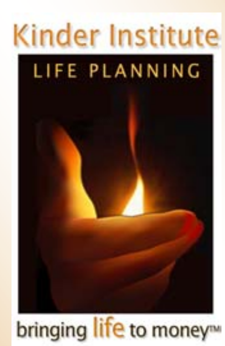
We'll begin on Thursday evening with getting reacquainted and some playful community building experiences. Friday will be a day of planned presentations from George, Susan, Marie and Bill Swift (back by popular demand), and others. We are hoping to welcome other leaders in the financial planning/life planning community. Saturday will be a Nazrudin-type day, as participants host their own discussions or offer related presentations of how they are applying Life Planning in their own work.

Sunday morning may see our East Coast attendees on their way to the airport, while others spend the morning hours discussing the business model for Life Planning, including marketing, publicity, fees, etc.

Saturday evening, we'll enjoy a special dinner at the nearby Stanley Hotel.

Come join us as we rub elbows with the elk and deer, enjoy the magnificent views, and bask in the warmth of caring and committed colleagues.

If you haven't done it yet,, stay over for the 5-day!



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Publicity for Life Planning

The first of the year brought the introduction of the best-selling book, **The Number**, by Lee Eisenberg. Lee attended the Seven Stages workshop in Denver prior to the FPA in 2004. He is a past Editor-in-Chief of Esquire magazine. Lee devotes two and a half chapters of his book to George, the Seven Stages, and Life Planning.

On January 9, TIME magazine included a 3-page insert in their Business edition, written by Lee, that extolled Life Planning as "financial planning done right" when the planner has been properly trained for that approach. There was also a full page write-up in Business Week. Sales of The Seven Stages of Money Maturity increased rapidly over the next weeks, as all the publicity around The Number inspired interest in Life Planning. Lee will be making keynote speeches to large financial companies and organizations over the months ahead, and will be carrying the message of Life Planning into those communities.

If you haven't yet read The Number, you might want to do so and see if it is a book you want to recommend to your clients.

More recently, Janet Kidd Stewart, of the Chicago Tribune, wrote a terrific article (4/16) on Life Planning which features two of our Certified Life Planners, Mary Zimmerman and Michelle Maton. The article is syndicated through Tribune Media, and is appearing in affiliated newspapers and media across the country. Clearly, the public is becoming aware of the importance of the human dimension of the financial planning relationship, to the benefit of all concerned. Check here: www.chicagotribune.com

With both of these impacts on the public awareness, we've seen an enormous increase in traffic to our website, and particularly to our directories of life planners. We've heard from a number of you who have received new client calls as a result. Awareness is growing.

RLP (Registered Life Planner): Our New Mark

The Kinder Institute has registered a new Certification Mark, Registered Life Planner (RLP). Those of you who have completed the requirements for that Mark are encouraged to begin using it on your business cards, email, stationery, etc. The Mark simply certifies that the holder has completed the Kinder Institute Training in Life Planning for Financial Planners and Advisors. It is not a guarantee of any other standard, at this point; but rather the beginning of setting standards for life planning skills.

Spring Bouquets

I think the week was awesome. The concept of life planning and the EVOKE model are perhaps the most powerful model I've ever seen for planning. My biggest insight during the week was that every financial planner/stock broker/ insurance agent talks and plans from the head - they talk about why their approach is the smartest/best/ most efficient, etc. The life planning approach that you and George teach is planning from the heart - a much different approach. I have had 4 new client meetings since the training and all 4 are moving forward. I think that much of it is because of this difference.

-Jason Maples
Denver

The training allowed me to slow down and see the incredible value in offering life planning. I experienced a deeper vision into myself and watched it unfold in my fellow classmates. It was very revealing to see the value and what it can do to enrich the lives of people we touch. Thank you for the opportunity.

- Dan Gensler
San Diego

This is the only time in nearly 20 years of practice that I have had a chance to observe experienced planners working with a client…and to have feedback from my peers.

-Sandy Porter
Georgia