

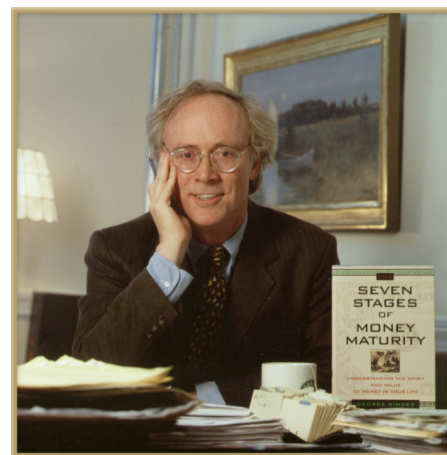
## Need a good speaker?

### Bring the wit and wisdom of George Kinder to your organization.

bringing **life** to money™

Long recognized as the father of the Life Planning movement, the Harvard-educated Kinder is the founder of the Kinder Institute of Life Planning ([www.KinderInstitute.com](http://www.KinderInstitute.com)). He has been a practicing financial planner and tax advisor for nearly 30 years. His book, [The Seven Stages of Money Maturity: Understanding the Spirit and Value of Money in Your Life](#) (Dell, 2000) is considered by many to be the seminal work in the burgeoning field of Life Planning. Available in most English speaking countries, it is now available in German and Japanese editions.

In 2002, *Mutual Funds* magazine listed Kinder as one of the “Top 100 Planners” in the country. In 2003 and again in 2005, *Investment Advisor* magazine named Mr. Kinder as “one of the 25 most influential people in financial services in America.” In January 2005, based on a poll of their readership, *Financial Planning* magazine named Kinder one of the 6 “most influential” financial planners in America; the other 5 planners named had all studied with Mr. Kinder. *Financial Planning* magazine also named him to their 2005 “Hall of Fame” – Kinder was one of only 3 financial planners whose name appeared next to John Bogle, Alan Greenspan, Burton Malkiel, Charles Schwab and Suze Orman.



In 2006, *FPA Press* published a second book, [Lighting the Torch: The Kinder Method of Life Planning](#), by George Kinder. This book has been hailed for the case studies and examples it provides in relationship to the Kinder EVOKE™ process. George also won the first-ever “Heart of Financial Planning Distinguished Service Award” from the 30,000-member Financial Planning Association for his work as an innovator and influencer in the profession. In 2007, Kinder achieved a long-held dream of publishing an epic poem, complete with sweeping photos of the Hawaiian coast in a lovely book titled [A Song for Hana and the Spirit of Leho’ula](#) (Serenity Press).

A media magnet, Kinder has been widely quoted and profiled in the United States. In recent years, publications in Australia, South Africa, the Netherlands and the United Kingdom have interviewed and profiled Kinder’s work and the global life planning movement. Kinder, who has appeared on NPR radio shows and a PBS television series, has been featured in *Financial Planning magazine*, *Wealth Manager magazine*, *Investment Advisor magazine*, *Boston Globe*, *Financial Times*, *Asset magazine*, *Motto magazine*, *Business Week*, *TIME*, *MSNMoney*, *LA Times*, *Wall Street Journal*, *New York magazine*, *Men’s Health* and many other publications.

Kinder takes great joy in traveling to far away places to speak with large audiences, whether they are financial advisor groups, association meetings or public gatherings, to share his insights on how to create a life plan that allows individuals to live a truly rich and full life. He has spoken at the national FPA annual convention and at hundreds of other conferences hosted by organizations such as Fidelity Group, Alliance, AXA and the Institute of Financial Planning in countries as far away as Australia, UK and South Africa.

Speeches are customized to the group. Popular topics include:

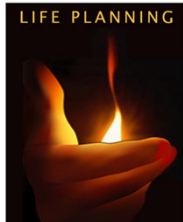
- Lighting the Torch: Life Planning’s Awakening
- Seven Stages of Money Maturity
- The Future of Financial Planning
- Financial Advice is Broken

### Contact Eva Brodzik

to discuss dates and details.

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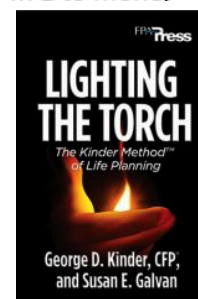


Popular presentations by George Kinder, CFP®  
Author. Poet. Teacher. Planner. Thought-leader.

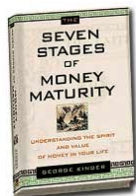
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## Lighting the Torch: Life Planning's Awakening How Listening Skills and Empathy Can Transform Your Practice

- How the burgeoning field of life planning brings the financial advisor / client relationship alive
- Kinder's unique client discovery process: An innovative way to create value using the 5 stage model called EVOKE™ (Exploration, Vision, Obstacles, Knowledge, Execution)
- Demonstration of relational skill sets of listening, empathy and inspiration
- Interactive and reflective exercises
- Inspiring stories of client-advisor relationships drawn from Kinder's personal practice, including video clips of actual life planning sessions
- How financial planning "done right" is transforming the world of money and delivering unrealized layers of freedom to people of all economic backgrounds, all over the world



## Seven Stages of Money Maturity® Understanding the Spirit and Value of Money in your life



- A totally original look at the ins and outs of individual economics
- Drawing on timeless spiritual wisdom in addition to modern fiscal doctrine, Kinder deftly combines the philosophical and the practical to help participants broaden their understanding of the overall role that money plays in life from childhood onward and, more importantly, put themselves on firmer footing with it today
- Offers specific financial steps and planning strategies
- Discusses the psychological stages people go through in their relationship to money:
  - Innocence (our naïve belief systems around money)
  - Pain (the difficult feelings we encounter)
  - Knowledge (of such skills as saving and investing, as well as self-knowledge)
  - Understanding (sophisticated emotional wisdom and the transformation of stress into wisdom)
  - Vigor (energy to reach financial goals)
  - Vision (directing vigor outward, perhaps to a community)
  - Aloha (altruism without expectation of gain of any kind)

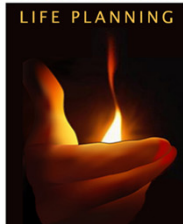
## The Future of Financial Planning Trends in the Industry – Past, Present and Future

- A look at the past 30 years
- The revolutionary movement from sales to service and models for its delivery
- Top 3 forces shaping the profession today
- Kinder's projections for the future
- How financial planning is rapidly becoming the greatest profession, based on integrity, freedom, relationships and accessibility to all

## Financial Advice is Broken

- How broken financial advice is related to the banking crises of 2008
- How advisors aren't meeting the needs of their clients
- How expectations of clients and advisors get in the way of great service
- How the low-esteem in which advisors are viewed by clients might be transformed overnight
- What clients really want and how to deliver it

To discuss dates and details, contact Eva Brodzik, Director of Business Development, at (913) 232-7506 or via email at [Eva.Brodzik@KinderInstitute.com](mailto:Eva.Brodzik@KinderInstitute.com).



## Audio/Visual Clips George Kinder, CFP®

bringing **life** to money™



### The Zen of Money / PBS Series

When the PBS producers and film crew met with George in 2006, he shared the three questions that, he believes, we all must ask ourselves when considering our relationship not only to money, but to life itself.



[View George Kinder Clip \(03:06\)](#)



**George Kinder Speech In UK:** This is a video of George Kinder speaking to financial planners in the United Kingdom. The topic is *Trends in the US and the Global Life Planning* movement. The six-city tour was sponsored by Fidelity International.

Click here to watch a fascinating video: <http://fidelity.bright-talk.com/brightcast/kinder101005>



### Lighting the Torch presented to the BOSTON ESTATE PLANNING

**COUNCIL:** George Kinder presents his *Lighting the Torch* speech to the Boston Estate Planning Council, January 2008. The BEPC speech begins with The Zen of Money TV video clip (above) as an introduction. Please watch it first and then watch this video.

**View now:** <http://www.kinderinstitute.com/video.html>



**George Kinder Interview on NPR:** In an interview on National Public Radio, host Kai Ryssdal speaks with George Kinder on Life Planning – what it is and how it can help people. “Most of us have heard of financial planners. They help you manage your money. But is that enough?” Ryssdal asks. Life planners offer to merge your financial hopes with your life goals. Which planner might better serve you? Kai finds out from George Kinder, the author of the book [The Seven Stages of Money Maturity: Understanding the Spirit and Value of Money in Your Life.](#)

**Listen now:**

[http://marketplace.publicradio.org/display/web/2004/12/11/life\\_planning](http://marketplace.publicradio.org/display/web/2004/12/11/life_planning)

