



## Client Information Sheet

Client: George Kinder, CFP®  
Company: Kinder Institute of Life Planning and author of three books including *Seven Stages of Money Maturity* and *Lighting the Torch*  
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### About George Kinder, CFP® -- “The Father of the Life Planning Movement”

**George Kinder, CFP®**, is co-founder of the Kinder Institute of Life Planning, an international affiliation of nearly 1000 financial advisors who have trained with Kinder and adopted his client-centered Life Planning methodologies. The author of three books, Kinder is a thoughtful voice in the financial services industry.

Long recognized as the father of the Life Planning movement, the Harvard educated Kinder has been a practicing financial planner and tax advisor for nearly thirty years. His book, *The Seven Stages of Money Maturity: Understanding the Spirit and Value of Money in Your Life*, published by Dell in 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.

A second book, *Lighting the Torch: The Kinder Method of Life Planning*, was published by the Financial Planning Association in 2006. In this book, Kinder and his co-author Susan Galvan, teach other financial advisors how to bring a more holistic “life planning” conversation to the financial planning work they do with their clients.

A new and exciting third book is Kinder’s most novel and creative work. Published by Serenity Point Press in 2007, *A Song for Hana & the Spirit of Leho‘ula* is a love story that unfolds across the majesty of the Hana coast, a sacred Hawaiian place threatened by development. In *A Song for Hana*, Kinder tells the story of becoming engaged with figures of ancient Hawaii. He is transformed by the experience, and comes to the spirit of the place -- and of himself -- in the hands of Leho‘ula, heroine of old Hawaii.

Among his accomplishments: In 1975 Kinder earned the Bronze Medal (third place) on the National Uniform Certified Public Accountant (CPA) exam in Massachusetts. In 1995 he co-founded “The Nazrudin Project,” an influential think tank of national financial advisors dedicated to exploring the human and spiritual aspects of money and personal finance. In 2000, Investment Advisor Magazine awarded Kinder its Portfolio Management Award given to those who have “contributed significantly to the art and science of portfolio management.”

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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, Loren Dunton, Burton Malkiel, Charles Schwab and Suze Orman. In 2006, Kinder receive the first ever “Heart of Financial Planning Award” from the Financial Planning Association.

Mr. Kinder has appeared on radio and television programs across the country, including Sound Money with Kai Ryssdal (click to [listen to the audio segment](#)). He has been profiled in the Boston Globe, Business Week, MSN MoneyCentral, New York Magazine, Bloomberg, the LA Times, MONEY magazine and more. His investment strategies have been featured in The Wall Street Journal, The New York Times, Newsweek, Fortune Magazine, and other national publications.

He has spoken at many national conferences including Charles Schwab & Co., Inc., the International Association of Financial Planners, the Social Investment Forum, the Institute of Certified Financial Planners, the National Association of Personal Financial Advisors and The Financial Planning Association. At the 2004 FPA National Conference, Kinder shared the stage with Ross Levin and Dick Wagner in a popular Super Session called “Life Planning and Interior Finance: 10 Years and Still Running Strong” ([order the audio tape here](#)).

In 2005, Fidelity sponsored a 7-City United Kingdom tour, with Mr. Kinder as a keynote presenter in London, Edinburgh, Manchester and other key cities. In 2007, he was honored to address the William Blake Society, speaking in London on “money and meaning”, to commemorate the 250<sup>th</sup> anniversary of Blake’s birth. As the life planning movement continues to span the globe, The Kinder Institute has been receiving more and more press coverage in countries such as the Netherlands, Australia and the United Kingdom. He has addressed groups and spoke for financial planning associations in Europe, Australia and South Africa.

Kinder’s two-day [Seven Stages of Money Maturity](#)® seminars have been widely attended by financial advisors and the general public. The Kinder Institute’s **5-day** *Training in Life Planning* has attracted many of the leaders of the financial planning industry. His Web site provides a listing for the general public of hundreds of advisors who have studied with him and do Life Planning all across the globe. Kinder currently divides his time between his offices in Massachusetts and Hawaii.

**Stories with George Kinder and his institute members (nearly 1000 in all) as a source could include:**

- The future of financial planning
- The Seven Stages of Money Maturity®
- How to create your ideal life ... now
- What is a life planner and how is that different from a financial planner
- Money and meaning – how to merge the two and become truly happy through an integrated financial and life plan