



George Kinder
presents at the
PFS Annual Conference

Opening Keynote Address - Thursday 26 November (10.10-10.55)

Life Planning and the Future of Financial Planning

George Kinder, Founder, Kinder Institute of Life Planning

Kinder will explore the forces and trends that will shape the future of financial planning for the next 20 years. He will start by examining three waves of change that shaped the profession over the past three decades, particularly how each major shift seemed to arise out of economic dislocations and investor disillusionment similar to the banking crisis of 2008. Kinder will then outline the client delivery process, interview by interview, most often used by financial Life Planners. He will detail how financial Life Planning can revolutionize the industry by transforming it from a sales-driven to a service-oriented model. The methodologies have astonishing implications for client retention, closing ratios, referrals, percentage of AUM, as well as sale value of a business. He will describe how the methodology increases productivity throughout the firm, and how it is transferable, trainable, scalable and saleable.

Breakout - Thursday 26 November (14.20-15.05)

Financial Life Planning:
The New Methodologies of Client Service Delivery

George Kinder, Founder, Kinder Institute of Life Planning

Drawing on the groundbreaking work in his books, *Lighting the Torch* and *The Seven Stages of Money Maturity*, you will learn how advisors build the most effective bond of trust with their clients, and how they then create the financial plan around the most cherished dreams of a client's life – dreams not often currently addressed in financial advisory meetings.

This experiential session will include practicing the major inspirational goal-setting exercises used by Life Planners all around the world, and then discussing their implications and implementation strategies for the UK market.