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works. Hence Financial Planning 3.0. Written eclectically, Financial Planning 3.0 looks at money not only from the "outside in" but, perhaps most importantly, from the "inside out".

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Money” by Richard B. Wagner. Wagner was one of the genuine original thinkers of the financial planning profession. In over 30 years, Wagner, George Kinder, Roy Diliberto, and a small group of other advisers conceived the financial life planning movement and expanded the frontiers of an emerging profession.

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Recording Date: June
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**Richard B. Wagner
(Author of Financial
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Michael Kitces is Head of Planning Strategy at Buckingham Wealth Partners, a turnkey wealth management services provider supporting thousands of independent financial advisors.. In addition, he is a co-founder of the XY

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Fortunately, Wagner was able to publish his book, “Financial Planning 3.0”, just a few months before he passed away, and in today’s weekend

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reading, we highlight what many view as the seminal article on how financial planners must evolve to truly become a recognized profession... an article he first published in the Journal of Financial Planning in 1990, that we are all collectively still trying to live up to today.

**Weekend Reading
for Financial
Planners (Apr 1-2)**

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With personal financial planning issues evolving in an increasingly challenging environment, it is becoming much more difficult to keep up with these important and timely changes. CPAs need to be in tune with the many new approaches needed in this continually changing environment. Part of the CPA's challenge is to help

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their goals, while
managing their
expectations, so ...

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