

KITCES FINANCIAL PLANNING VALUE SUMMIT

See How Successful Advisors Are Communicating and Demonstrating the Value of Financial Planning

Thursday, Dec 11, 2025

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Introduction

This workbook is designed to help you capture key notes as you go behind the scenes with our expert guests during the information-packed Summit. There is space within this workbook for you to start mapping out your plan of action.

Agenda

Expert guests will take you behind the scenes with real-world examples of what advisors can do to market themselves to prospects and clients.



The Value of Ongoing Financial Planning

Michael Kitces

Founder & Chief Financial Planning Nerd, Kitces.com



The Value of Ongoing Financial Planning

Taylor Schulte, CFP®

Founder, Define Financial



Creating High-Touch Flourishes For A More Concierge Onboarding Process

John Kennedy, CFP®

Partner & Senior Wealth Advisor, CandorPath Financial



Using A (Non-Financial) Goals Workbook To Deepen New Client Conversations

Emily Biehler, CFP®, CEPA®

Co-Founder, TrailWise Financial Partners



Integrating A Third-Party Estate Document Preparer To Enhance The Client Value Proposition

Daniel Kopp, CFP®

Founder / Lead Financial Planner, Wise Stewardship Financial Planning, LLC



Determining What Services To Double Down On (And Which To Eliminate) By Collecting Clients' Jobs-To-Be-Done Feedback

Thomas Meek, MS, CFP®

Director of Operations + Planning, Pandowealth



Segmenting Right-Fit Clients (And Transitioning Others) By Connecting to The Firm's Core Values

Nicole Milone

Chief Wealth Officer, Solaris Strategic Wealth



Implementing New Fee Minimums (With Grace) To Protect Capacity and Strengthen Sustainability

Tim Goodwin, CFP®

Founder and Senior Wealth Advisor, Goodwin Investment Advisory



Michael Kitces & Taylor Schulte

The Value of Ongoing Financial Planning

Session Notes



Michael Kitces & Taylor Schulte

The Value of Ongoing Financial Planning

Key Takeaways From This Session

Plan Of Action

What is the first (small) action you're going to take in the coming week to move forward?



John Kennedy

Creating High-Touch Flourishes for a More Concierge Onboarding Process

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Daniel Kopp

Integrating A Third-Party Estate Document
Preparer To Enhance The Client Value Proposition

Session Notes



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Preparer To Enhance The Client Value Proposition

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Thomas Meek

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Nicole Milone

Segmenting Right-Fit Clients (And Transitioning Others) By Connecting to The Firm's Core Value

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Nicole Milone

Segmenting Right-Fit Clients (And Transitioning Others) By Connecting to The Firm's Core Values

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Tim Goodwin

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