



Financial Planning 3.0: Evolving Our Relationships with Money

Richard B Wagner Jd Cfp(r)

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Money is weird stuff. We cannot avoid it but it terrifies and mystifies. Most folks need help relating to it-- and lots of it. Most especially, they need their own financial planner, someone who thoroughly understands money, what it is and how it works. Hence Financial Planning 3.0. Written eclectically, Financial Planning 3.0 looks at money and the financial planning profession from both the "outside in" and, perhaps more importantly, from the "inside out." It makes the case for looking at money from the perspectives of individuals and families. This is in stark contrast to money's public persona grounded in macroeconomics and investment theory. It suggests useful resources and tools for working with money helpfully, healthfully and joyfully. Finally, treating money as the most powerful and pervasive secular force on the planet and financial planning as the most important profession of the 21st century, it posits the new "liberal arts" based academic discipline of "Finology." Financial Planning 3.0 includes a proposed curriculum for an education in Finology including a "Finology Major's Handbook" together with portions of articles the author has written over the past 25 years. This book takes money out of the closet, applies a liberal arts approach to the financial planning profession and its garden of knowledge. It advances the evolution of this profession's work with money, the money forces and individuals with an eye to the future and respect for the past.

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