Becoming A Fellow & Podcast Interviewee

WHAT IS FINOLOGY?

CULTIVATING THE FIELDS OF MONEY

The Story

In Dick Wagner's book, Financial Planning 3.0, Dick Wagner, JD, CFP® identified an important and previously unidentified area of study: *Finology*.

The study of money and exchanging value.

The topic is so in front of our faces, so much the water in which we swim, that it took till now to recognize that humans have been exchanging value regularly for thousands of years. That it is deeply important to each of us. Since money is exchanging value that it is, obviously, value laden, not value neutral. We only have to turn inward to acknowledge that truth. It is also manifested externally in a variety of ways, from exchanging money to favors to performing what we feel is our civic duty.

The dynamic of value exchange is complex. There is a lot of material that will be discovered about Finology in the years to come. We need your help to make that happen. The topic is still in formative stages. This is an incredible opportunity to champion aa area of knowledge that will be colloquial, when our job is done.

WorthLiving is continuing the legacy of Dick Wagner's work starting with the What is Finology? podcast. After proving the track record of the podcast we will expand the project to work with planers answering the questions that Dick asked in his work, conferences and more.

Dick’s Work in Action Today

Earlier in 2018 The Financial Planning Association and the CFP Board fund joined forces and announced the Richard B. (Dick) Wagner Memorial Scholarship Fund.

The Financial Planning 3.0 book is being read by CFP® Pros around the world and is being used in the master’s degree curriculum at Golden Gate University and Creighton University.

The Nazrudin Project is awarding funds in Dick’s name annually. Correspondence for this award is handled through dickwagnerfund2018@gmail.com

And now, with your help, the What is Finology? Fellowship.

The Show – What Is Finology?

The next phase of WorthLiving is to create a podcast that showcases Finology and Financial Planning 3.0.

The first two seasons of the What is Finology? Podcast will be interviews and conversations with Dick's colleagues and peers.

The reason for this is that Dick shared facets of his thoughts and perspectives uniquely with each of his friends. Though we only have one episode recorded with Dick himself.

Each interviewee is a longtime friend of Dick's who understands his work deeply and has integrated it with their own. This podcast will showcase the wisdom of these luminaries.

Each speaker shares their wisdom in an episode that will be 30-40 minutes long. Some interviews are already double episodes because of the quality of the content.

The Hosts

Jacob B. Wagner, CDMP

Jake has been Dick Wagner's right hand man for the latter portion of his career. As the COO of WorthLiving he was involved in the day-to-day operations of Dick's work and writings.

As a result he has been listening to Dick's pontifications and contributing to his thought leadership from the beginning of WorthLiving.

As one of Dick's confidants, he has been inextricably involved in Dick's writing, reflections, public appearances since the formation of WorthLiving. Often copy editing articles and advising about next steps for WorthLiving and Dick's career.

Jake was critical in the publishing process of Dick's last book and is curating the materials that he left for us, from a single podcast recording of What is Finology? to dealing with the publishers and other logistics required to get the book published. As a result Jake has a unique awareness about what Dick was trying to share with the world.

In addition to 15+ years in the CFP® Profession, Jake has worked with the Integral Institute, which is the basis of Dick's work in Integral Finance and gives Jake a unique ability to speak to how "Integral" relates to the planning world.

– Your Involvement –

Sharing Your Wisdom

What we need from you:

- Confirm interest in being an interviewee on the podcast.
- Schedule one hour for recording with your host.
- Preparatory email conversation with your host identifying questions and the arc of the conversation.
- Setting up your recording environment to optimize sound quality.
- Review the finished podcast.
- Ideally, we would appreciate you sharing the podcast with your peers and clients.

- **Share some of the special wisdom that you learned from Dick, especially around Finology and Financial Planning 3.0.**

We want to give you:

- \$250 – Either awarded as income or donated to the non-profit program of your choice.

– Being a Fellow –

WiF? Fellows

Every podcast interviewee is automatically a Fellow

- Additional Fellows will be suggested to be added by current Fellows.
- All active Fellows will vote whether or not they approve of an additional Fellow to the fellowship

Receiving this invitation, regardless of whether you become a podcast interviewee, means that you are invited to be a What is Finology? Fellow.

This Fellowship as a way to for us to guide the next conversation together.

Each one of us had our own relationship, knowledge and wisdom that they learned through their conversations with Dick.

We can use this container as a structure to collaborate and speak about Dick’s work, as well as having a logical way for folks to incorporate it into their individual work.

The purpose of the Fellowship is to provide a community and space to continue the wisdom and knowledge inspired by Dick Wagner.

– Fall 2014 – Summit County, Colorado

Email Jake Wagner at Jake@digitalmarketing4fp.com

– Participation – | **Thank You**

Interested?

Email Jake Wagner at Jake@digitalmarketing4fp.com

To schedule your podcast interview

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To learn more, call Jake at 303.725.1219
or email jake@digitalmarketing4fp.com