Partnership Opportunity

What is Finology?

CULTIVATING THE FIELDS OF MONEY

The Story

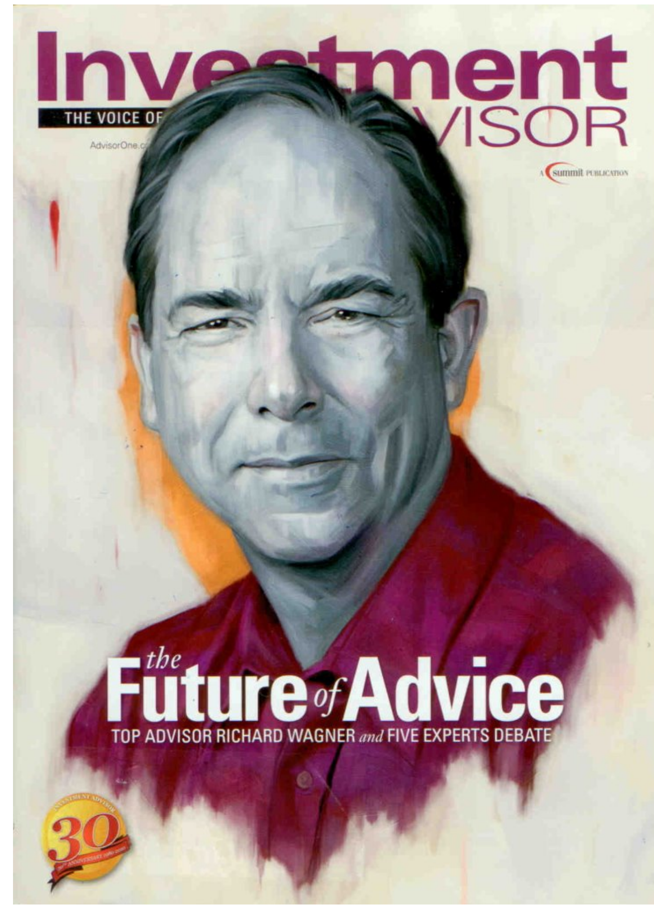
In Dick Wagner's book, Financial Planning 3.0, Dick Wagner, JD, CFP® identified an important and previously unidentified area of study: *Finology*.

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. Value laden, not value neutral. We do so 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 and this is an incredible opportunity to champion a 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.



WHAT IS FINOLOGY?

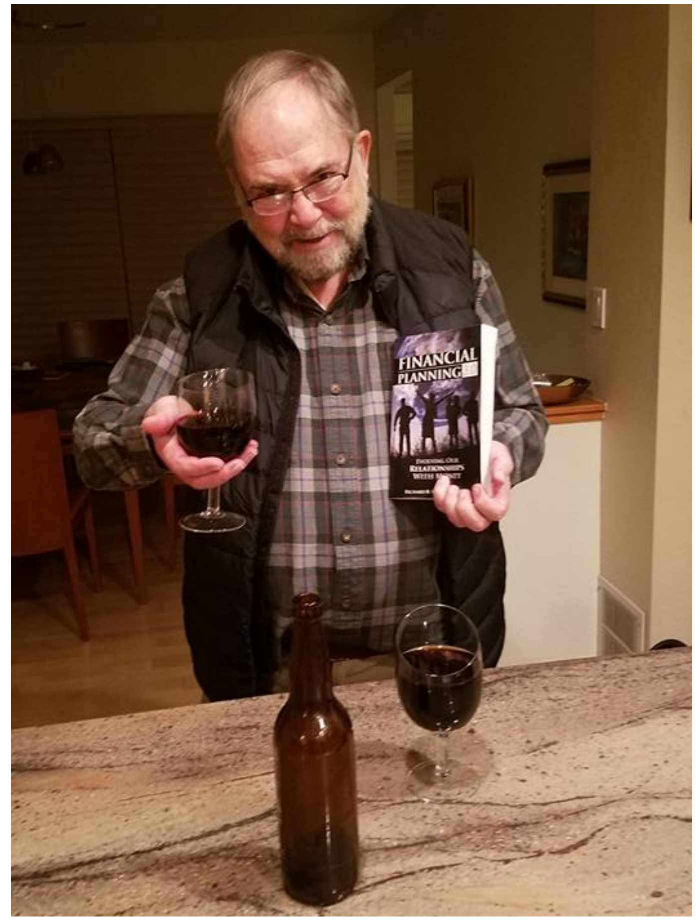
Dick’s Work in Action Today

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.

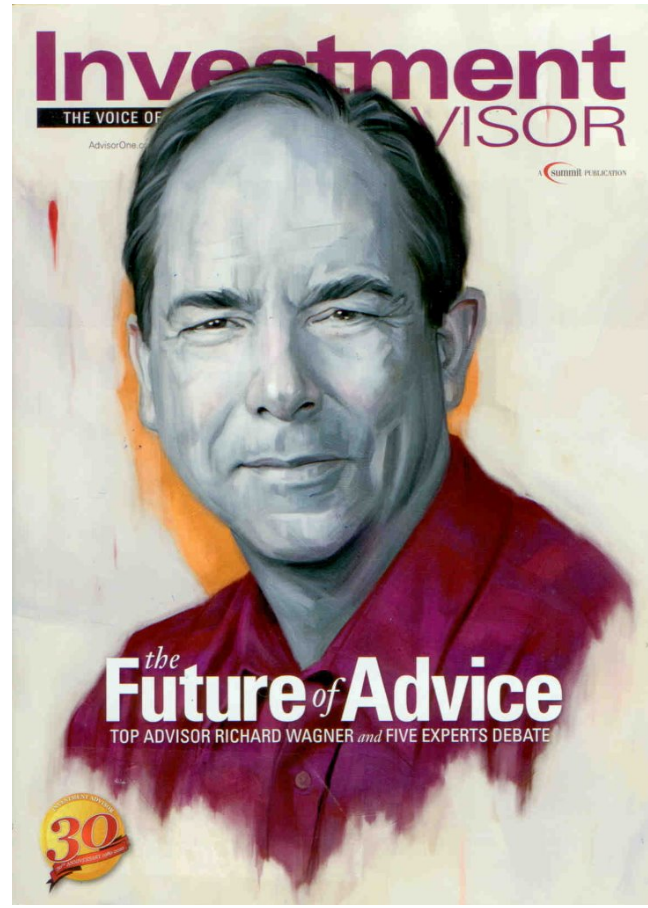
Each interviewee is a longtime friend of Dick's who understands his work deeply and has integrated it with their own. This podcast will showcase the wisdom of these luminaries.

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.

One CFP® Pro stated that he thought that Jake channeled Dick's logical left brain and that Natalie channeled his visionary side.

Dick, Jake and Natalie working on this project together is something that Dick desired deeply but was unable to see manifest.

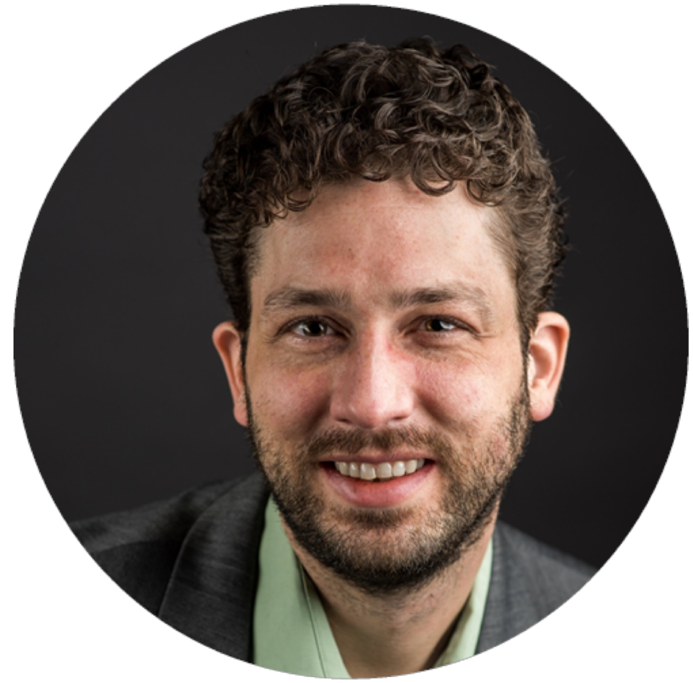
We invite you to be a critical player in the next stage of realizing Wagner's wisdom.



WHAT IS FINOLOGY?

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.

The Hosts

Natalie Wagner-Willis, CFRC

Through their conversations and Dick's parental influence Natalie acquired a unique understanding of Dick's passion and vision. She thinks like him.

Her method of expressing what she learned from Dick has resulted in her turning our understanding of exchanging value and money on its head.

She has created a system, the Money Energy Cycle, and provides structure that enables her clients to improve their relationship with earning money, spending money and exchanging value.

Her clients learn how to best use their resources in a way that feels in alignment with the life they want to for themselves and their family. She is passionate about the greater mission to help people live well with money and is excited to be a part of finology as a field.

Her work has been praised by many CFP® Pros and has been praised by many of the thought leaders joining the What is Finology? podcast.

As a Finologist, her work offers insight into the topic at large. She deepens and expands the conversation through her natural perspective and cultivated expertise.

The Pioneers

Recorded Episodes

Carol Anderson
Money Quotient

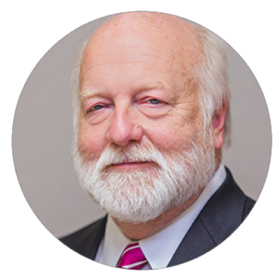
Carol Anderson is the founder and President of Money Quotient. She has an M.S. in Consumer Economics & Family Resource Management and a diverse background in business, education, and financial services. Since 1989, Carol has focused on the issues of financial planning education, retirement preparation, life planning, and productive aging.

Elizabeth Jetton CFP ®
Turning Point

Elizabeth Jetton, CFP®, has been a thought leader in the financial planning profession for the past 20 years. She has been in the financial services industry since 1981, a CFP® professional since 1991 and served as President of The Financial Planning Association in 2004. In 2010 Elizabeth retired from her financial planning practice to focus on consulting to financial planning firms and teaching. She helps advisors and firms build thriving client-centered practices, processes, services and deliverables.

Rick Kahler CFP®
Kahler Financial

Rick Kahler, MSFP, ChFC, CFP®, CCIM, founded Kahler Financial Group in 1981.
His work was featured on ABC News's 20/20. *The Wall Street Journal* hailed this work. Rick has served on several national boards and is currently a founding board member and past Chair of the *Financial Therapy Association*, and is a past director of the *National Association of Personal Financial Advisors* Midwest Board.



Marty Kurtz, CFP®
The Planning Center

I told myself I would one day help people protect, prepare, and provide for themselves, their families and the things they care about: specifically in dealing with their lives and money. I am proud to filter the noise and chaos of the financial markets for our clients, and provide them with solid guidance in understanding their financial lives. My long-term goal is to leave behind a company that lives on, continuously improves, and expands the horizons of the people it serves.

Sponsors

You have the opportunity to participate and lead history.

The artists of the renaissance were only 1000 or so people. It was funded by well under 100.

20 % of all sponsorship income is going to be spent on paid traffic

We are asking you to be that type of champion

The Opportunity

Sponsoring the WiF? Podcast

2x – Slots

Diamond Sponsor - $5000

On the Podcast

- :30 intro advertisement for your organization for 8 episodes
- :30 mid-episode advertisement in 12 episodes
- :30 end-episode advertisement in 8 episodes

In Social Media

- Thank you Social media post after each sponsored episode
- Social Media ”shares” recognizing your support

On the Website and Newsletter

- Full Section display (full width) ad just below fold on the website
- Logo placement on the website and newsletter
- Thank you at bottom of episode annoucement email

The Opportunity

Sponsoring the WiF? Podcast

2x – Slots

Platinum Sponsor - $2500

On the Podcast

- :30 intro advertisement for your organization for 7 episodes
- :30 mid-episode advertisement in 16 episodes
- :30 end-episode advertisement in 16 episodes

In Social Media

- Thank you Social media post after each sponsored episode
- Social Media ”shares” recognizing your support

On the Website and Newsletter

- 1/2 page in 2x2 grid display ad on the website
- Logo placement on the website and newsletter
- Thank you at bottom of episode annoucement email

WHAT IS FINOLOGY?

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Sponsoring the WiF? Podcast

2x – Slots

Gold Sponsor - $1250

On the Podcast

- :30 intro advertisement for your organization for 5 episodes
- :30 mid-episode advertisement in 12 episodes
- :30 end-episode advertisement in 16 episodes

In Social Media

- Social Media ”shares” recognizing your support after half your sponsored episodes

On the Website and Newsletter

- 1/3 page in 2x3 grid display (full width) ad on the website
- Logo placement on the website and newsletter – Gold tier placement
- Thank you at bottom of episode announcement email

What is Finology?

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To learn more, visit www.whatisfinology.com
or email sponsorship@whatisfinology.com