WHAT IS FINOLOGY?
CULTIVATING THE FIELDS OF MONEY

Helping other people to navigate their lives by using money well, because money can and should be used for great good.

Welcome to the What is Finology? podcast, we're delighted to have you with us!

Of the many lessons dad (Richard [Dick] Wagner, JD, CFP®) impressed upon me, standing at the top is the profound charge embodied in our workas Finologists. Money and the fearsome forces it generates have become "the bedrock of nearly all human undertakings" (R.Wagner, Financial Planning 3.0), and those with insight and skill are called to help navigate this awesome world.

The term, "Finology" (defined as: The study of people exchanging value, our personal relationships with money, and what money means in our lives), not only honors dad's acumen and legacy, it empowers us to explore new frontiers. In examining the question, What is Finlogy? we intend to change the global conversation around money.

We've invited you on our podcast because we believe you have insight into the question, "What is Finology?" Exploring your insight is the purpose of our episode.

After considering the question, What do I know of Finology?, please provide 1 - 5 talking points and a 2 - 3 sentence overview of the messages you intend to convey to our audience. We will use these to guide our conversation.

Notes: Please keep in mind that we want to minimize technical content and jargon, and our final recording will be between 18 and 35 minutes.

Overview:

Talking points:

This first WiF? season is focused on "the pioneers," or the folks who were hand in hand with Dad breaking ground in the financial planning profession and germinating the first seeds of Finology. It's an honor to bring this group, your contributions and your stories together. We appreciate your being with us, and we look forward to a wonderful conversation.

Heartfully,

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