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Michael Kitces Webinar: earn 1 CE credit!

Submitted by Rica Zara on October 26, 2022 - 12:00am

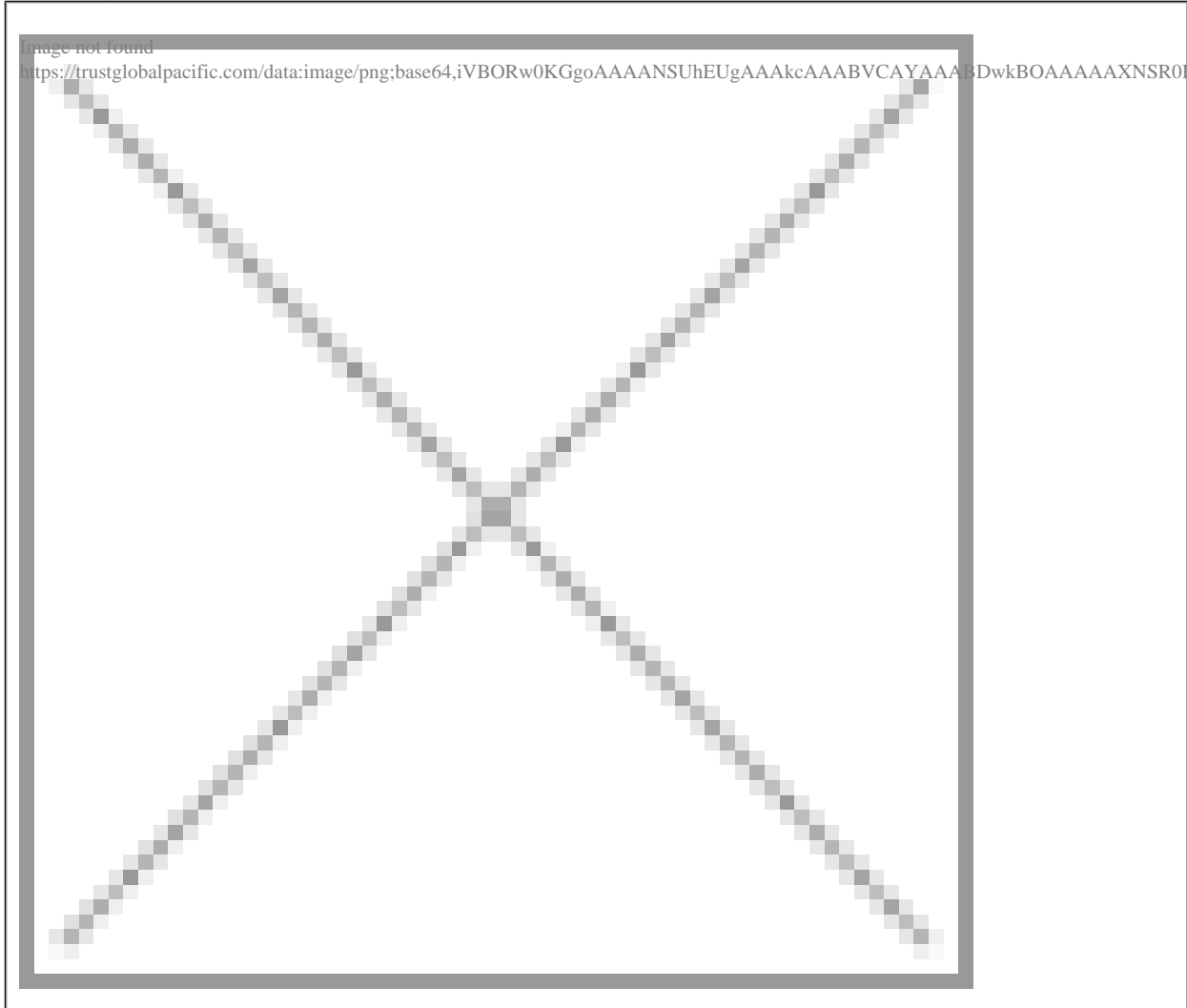


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SSQ Insurance

What makes financial planning more efficient - Webinar

Financial planning is valuable for clients, but it's time-consuming to prepare and deliver as a financial advisor. This time commitment impacts everything from the price that advisors charge for a financial plan, to the breadth of clients that can be served, and the staffing and technology infrastructure to deliver financial planning advice.

In this session, we explore the latest Kitces Research study on "How Financial Advisors Really Do Financial Planning." to understand how long it really takes to create and deliver a financial plan, where time-savings opportunities are (or are not), the role of staff support in scaling financial advice, how technology impacts planning efficiencies, and the interaction between planning expertise (in the form of advanced designations like CFP certification), experience, and niche specializations, in making the delivery of financial planning more efficient.

About Michael Kitces

MSFS, MTAX, CFP®, CLU, ChFC, RHU, REBC, CASL

Mr. Kitces is the Chief Financial Planning Nerd at Kitces.com, a site dedicated to advancing knowledge in financial planning and helping to make financial advisors better and more successful. In addition, he is the Head of Planning Strategy at Buckingham Wealth Partners, the co-founder of the XY Planning Network, AdvicePay, New Planner Recruiting, fpPathfinder, and FA BeanCounters, the former Practitioner Editor of the *Journal of Financial Planning*, the host of the *Financial Advisor Success* podcast, and the publisher of the popular financial planning industry blog *Nerd's Eye View*.

Guest Speaker : Michael Kitces

Join us on **Tuesday, November 8**
10:30 am PT | 11:30 am MT | 12:30 pm
1:30 pm ET | 2:30 pm AT | 3:00 pm
Duration: 1 hour

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