

Financially InKlein'd™

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FINANCIAL DESIGN
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Planning, Managing, and Protecting
Your Financial Independence™

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Life Planning Your Financial Independence

Have you discussed your life dreams and personal goals, aside from your money goals, with your financial advisor? Has your advisor worked with you to design and implement a life plan to enable you to achieve your most heartfelt aspirations, purpose, and meaning in life? If not, welcome to life planning!

What is Life Planning?

Each of us harbors a profound dream in life. Life planning is the process of discovering, or bringing to the surface, this dream and making it a reality.

Life planning involves an ongoing relationship between a financial advisor who is specially trained in life planning skills and a client that places the life goals of the client at the heart of the client-advisor relationship.

A life planner works with each of his/her clients to discover what is really important to them and uses this information to custom-design and implement a life plan for achieving their life goals.

Why Work with a Life Planner?

Life planning is a more open-ended process than traditional financial planning since it takes into account how life is to be lived more than how money is to be accumulated and ultimately spent.

Life planners, in addition to possessing traditional financial planning skills, receive special training in relationship skills specific to life planning. They use these skills to bring a client-centered, collaborative, life-focused approach to every planning relationship.

By working with a life planner, you will enjoy a deeper, more trusting relationship with your planning professional that is focused on the pursuit and achievement of your life-long dreams.

The Life Planning Process

Most, if not all, professional life planners have been trained in The Kinder Method™ of Life Planning. George Kinder is nationally recognized as the father of the life planning movement and is the founder of the Kinder Institute of Life Planning.

The life planning process, as practiced using this system, involves a series of collaborative meetings between you and your life planner employing specific life planning techniques designed to enable you to develop, and to ultimately achieve, your "heart's core" goal.

The purpose of the initial meeting is to create a bond between you and your life planner. Your planner typically will engage in an exploratory conversation with you to discuss what it is that you would like to accomplish in your relationship with him or her.

Your life planner will use a series of techniques during the second, and typically most inspiring, meeting to identify, and develop, your vision of your lifelong dream.

Once the vision of your utmost goal has taken shape, your life planner will work with you to discuss and resolve potential internal and external obstacles for achieving your goal.

The next step is working with you to design a financial life plan, including specific action steps for fulfilling your plan. Last, but not least, comes the execution of your plan.

Pursuit of Meaningful Life Goals

After your meaningful life goal has been discovered or brought to the surface, money concerns can be addressed that support the realization of your life goal rather than simply accumulating money for its own sake.

George Kinder, in his book **Lighting the Torch**, states "Living life from the heart's core, fulfilling one's dream of freedom, brings the kind of wealth and well-being that no amount of money could ever buy and eliminates an internal emptiness that no amount of material goodies could ever fill."

Are you ready to pursue your life-long dreams? Bob Klein has been trained by George Kinder in The Kinder Method™ of Life Planning and is ready to help you realize them!