

## DECEMBER 2020 DISCUSSION QUESTIONS

1

### INTRODUCTIONS

Introduce yourselves! Check in. Everybody good? Everybody staying healthy?

2

### HOW HAS COVID-19 IMPACTED THE FUTURE OF THE PROFESSION?

Dennis Stearns writes in "Future Tense: Post-COVID-19 Future of Financial Planning" that we've had to evolve faster due to the pandemic. How do you think the pandemic has impacted the future of planning?

3

### FINANCIAL PLANNING CAREER PATH OF THE FUTURE

Brent Weiss writes that we need to evolve and adapt for the future. In what ways do you think we need to do that?

4

### OPTIMIZING CLIENT OPTIONS FOR PEACE OF MIND

Read Eric Toya's column. Do you ever let clients make a decision that will yield a good (even if statistically suboptimal) result if it helps your clients sleep better at night? Why/why not?

5

### ROTH STRATEGY NOW

Read the research. Discuss why more people would benefit from a Roth strategy post SECURE Act. What are your thoughts?