

FEBRUARY 2021 DISCUSSION QUESTIONS

1

EXPANDING THE MIND

Dani Fava said in her Q&A that her favorite quote was "Once the mind expands, it can never go back." Through this lens, in what ways have our minds been expanded in terms of fintech over the past year?

2

THE PANDEMIC'S IMPACT ON FINTECH

What fintech became most valuable to you during the pandemic and why? What fintech trends do you foresee coming out of the pandemic? What trends are going to stick around for the long-term?

3

SUCCESSION PLANNING IS ABOUT MORE THAN RETIREMENT

Lew Walker writes about how attracting next gen planners is crucial and a part of that is having the right tech in place. He talks particularly about utilizing social media. Do you use social media in your practice? Why/why not? How do clients respond?

4

SYSTEMITIZING PROCESS AUDITS

How often do you perform process audits? If so, how have your process audits changed over the years? Do you have a process manager in your office?

5

STAYING RELEVANT IN A PANDEMIC

What are some ways you've adapted your marketing in the virtual environment? How have you connected with and celebrated clients?