

FEBRUARY 2021 DISCUSSION QUESTIONS

1

INTRODUCTIONS

If you don't know each other, introduce yourselves! Check in with each other!

2

WHY YOUR BUSINESS MODEL?

What is the business model of your firm or company? What are some of the benefits and downfalls of this particular business model?

3

DOES A RETAINER-BASED BUSINESS MODEL MAKE SENSE?

What do you think about what Steve Swicegood writes about a retainer-based business model?

4

RESEARCH AND TEACHING CAREER PATHS

Christina Lynn and Josh Harris write about how the future of financial planning rests on our ability to become an evidence-based profession. Are any of you pursuing research or teaching career paths? How did you choose that path?

5

SERVING ON YOUR CHAPTER BOARD?

Haley Tolitsky talks about how serving on her chapter's board has helped her in many ways. Do you all serve on, or are you part of, your chapter board? How has it helped your career?