

MARCH 2021 DISCUSSION QUESTIONS

1

MEDIATION FOR FINANCIAL PLANNERS

Rachel Goldman writes about three cornerstone mediation techniques that financial planners can learn and use with clients. Do you use any of these techniques? How has it worked out for you?

2

BUILDING TRUST WITH CLIENTS

Barbara Kay writes about building trust in this month's issue. In what ways do you build trust with your clients? What ways have not worked in the past?

3

RESEARCH ROUND-UP

Daniel Yerger's column, he recapped two pieces of research. What did you think of these recaps? Had you read the full research pieces?

4

THE MINUSES OF PLUS LOANS

Ross Riskin discussed planning for Parent PLUS loans. Have your clients taken out any Parent PLUS loans to help their kids through school? What have you learned in helping them? How will you implement what you learned in this article?

5

THE TAX EFFICIENCY OF DECUMULATION STRATEGIES

Geisler, Harden and Hulse compared the tax efficiencies of decumulation strategies. What were your thoughts about this research?