

MARCH 2021 DISCUSSION QUESTIONS

1

MEGA TRENDS IMPACTING FINTECH

Investnet released a report on the social mega trends impacting fintech. Let's talk about those trends. How do you see them impacting both your life and fintech?

2

THE CHANGING ROLE OF PLANNERS?

Mike Kerins writes about how the role of planners is changing such that we will be more like a personal CFO for clients. What are your thoughts on this?

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

CHANGING PATHS

Rachel Elson was an editor-in-chief prior to coming into financial planning. She talked about her advice for other career changers. What did you like most about her story and what would your advice be to other career changers?

5

WHAT'S SOMETHING YOU'RE WORKING ON TO IMPROVE?

What are you working on to improve yourself, your career or both?