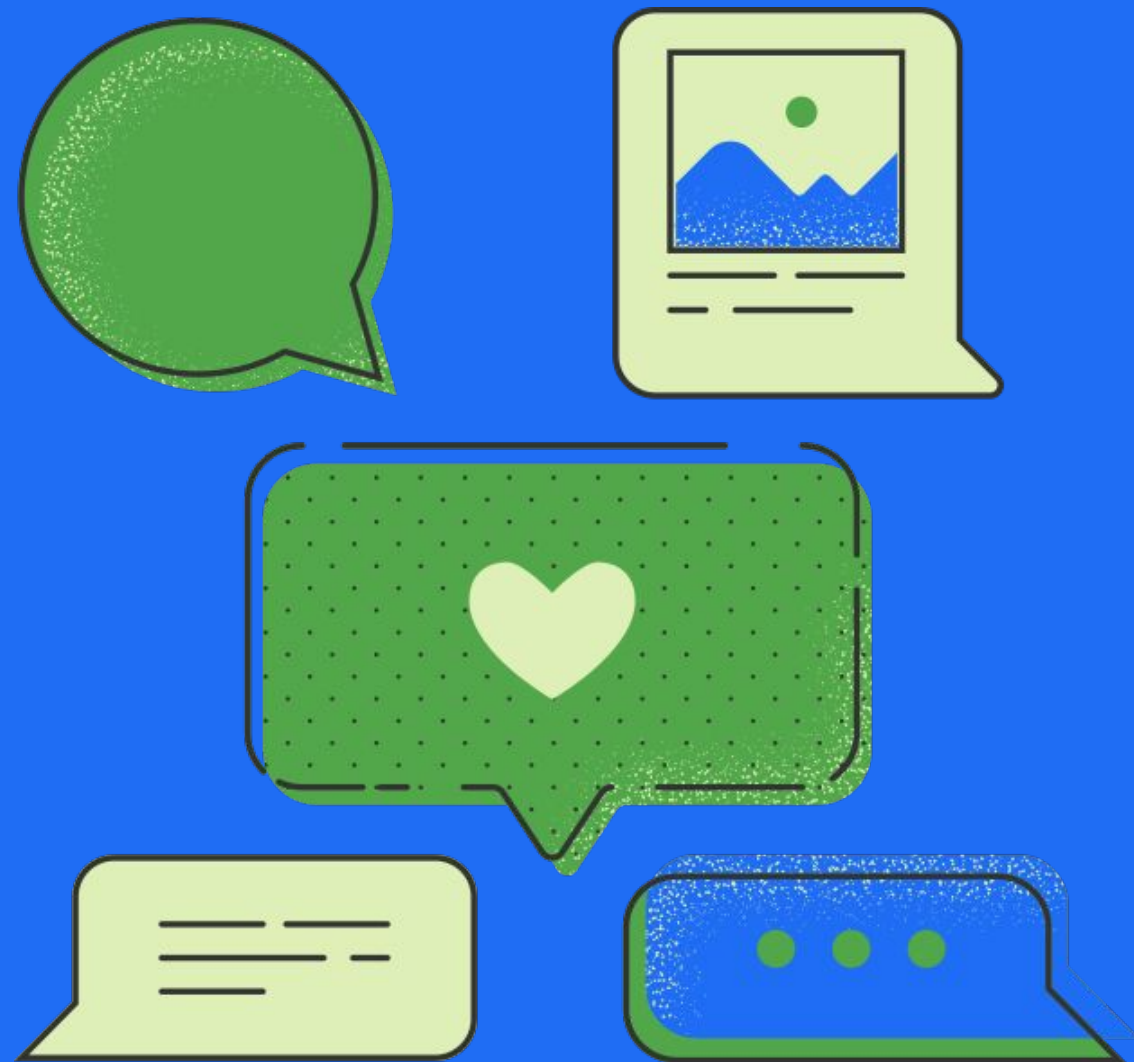




# Town Hall

**AUG 2022**





# AMA on the way

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Ready to put us in the hot seat? Submit your questions!

**WWW.SLI.DO**

CODE: **XYPN**



# PASS THE MIC

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Alan Moore, CFP®, is the CEO & Co-Founder of XY Planning Network—and creator of the Dream Team.







# Hear About Our Tax Update?



An XYTS update is imminent—bear with us as we fine-tune final details. Please **hold off on asking questions about XYTS** as we finalize our program for the 2022 season.

## What can you expect from us?

1. We will be hosting a XYTS Town Hall for all 2021 users on **September 20**.
2. We will **announce our full program** to the Network after that.
3. We're closing out the 2022 season.



—  
**Say  
hello!**



**Todd Marshall**  
SENIOR TAX SPECIALIST



**Madeline Miller**  
VP OF ACCOUNTING SERVICES



**Frank Gerbus**  
TAX MANAGER



**Antwoine Winters**  
SEASONAL TAX SPECIALIST



**Jesse Sanders**  
SENIOR TAX SPECIALIST





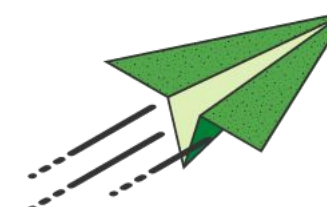
# PROMOTE YOUR FIRM

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We want to highlight the amazing work our members do every day. Know someone with a success story or maybe have your own to share?

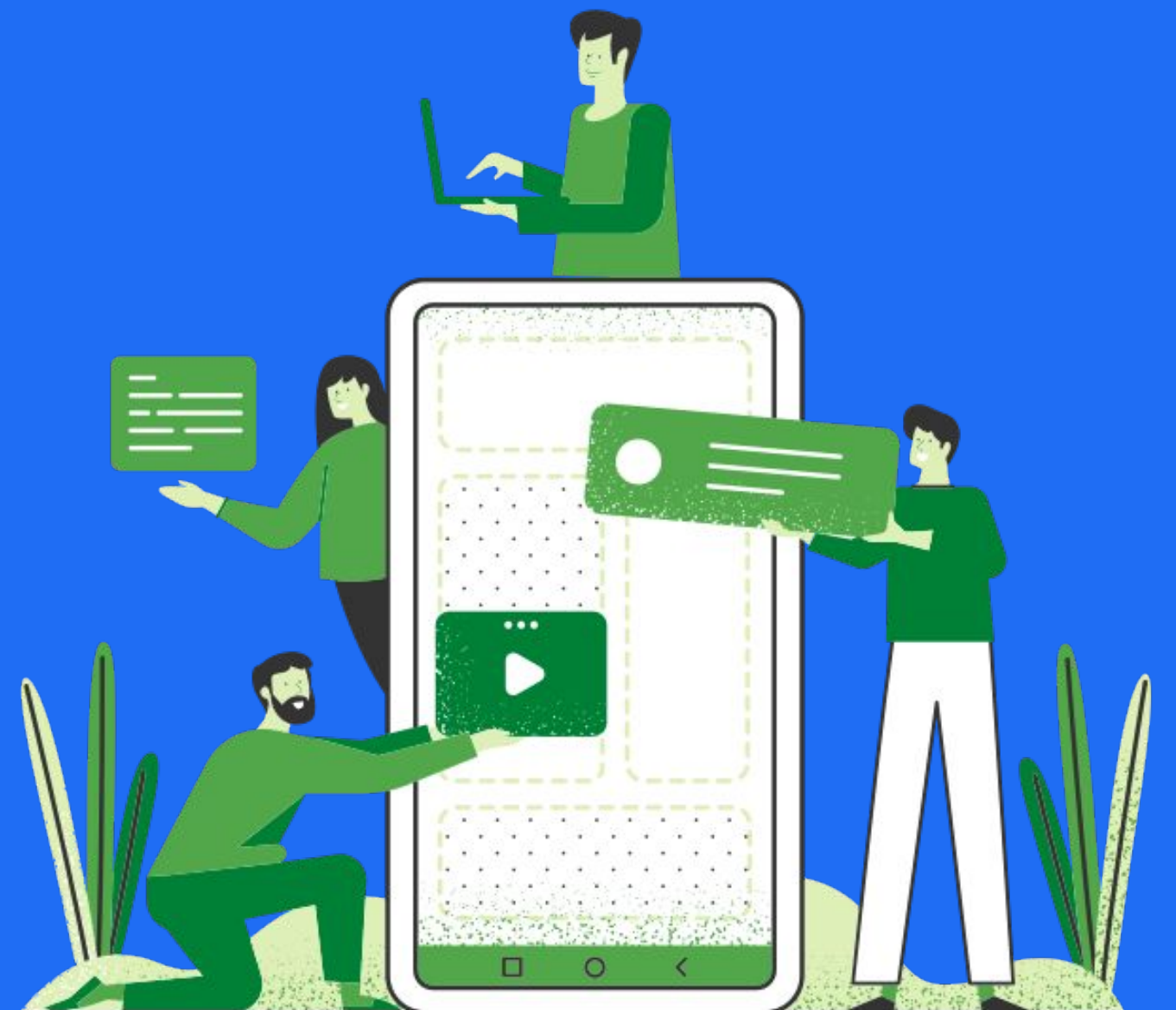
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**Nominate a guest for #XYPNRadio**—now hosted by Alan, who recently rejoined the podcast—or **submit a blog** to be featured in the weekly consumer blogs.



Want to find ways to promote your firm?  
**CHECK OUT THE GROW YOUR AUDIENCE  
KNOWLEDGE BASE**

# BE AN AMBASSADOR



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## What does it mean to be an XYPN Ambassador?

We'll occasionally connect you with prospective XYPN members to share your membership experience.

---

## What are the benefits:

1. As an XYPN Ambassador, you will receive a **month of membership** for each member you refer to the XYPN network.
2. Added perk: you'll receive XYPN Ambassador t-shirt swag!



Take your member-experience to the next level  
**APPLY TO BE AN AMBASSADOR TODAY**





# Did you hear the news?



We are proud to say that **25% of Investopia's top 100** financial advisors of 2022 are XYPN members—the list highlights and celebrates the top financial advisors who are making significant contributions to the industry.

Talk about making waves! **Let's continue to re:invent the financial planning industry together.**

# 25%



# In the media

XY Planning Network has made the annual Inc. 5000 list (**for the 5th year in a row**) that recognizes the fastest growing companies in America—but we weren't the only ones who made the list.

Two firms in the XY Planning Network made it on the annual Inc. 5000 list—**Fiduciary Financial Advisors** and **Brooklyn FI** also made the list!



Join us!

**LET'S CELEBRATE OUR MEMBERS**



**Ally Jane Ayers**

CFP®, EA, CEP, RLP



**Ben VerWys**

CEPA



**Shane Mason**

CPR/PFD, CFP®, CPWA®

# Inc. 5000

## HONOR ROLL

**5X HONOREE**

2022



# PASS THE MIC

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Michael Kitces, CFP®, is the Co-Founder and Chairman of the board—let's hear what he has to share.







# Advocacy Update

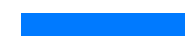


We're always looking for ways to move the industry forward.

**Here's the latest.**



Colorado Letter



Recent FPA announcements



# Market Update with Mario

We all are feeling the heat at the pump, in the grocery store, and in our firms. XY Planning Network acknowledges that **inflation is on all of our minds**.





# PASS THE MIC

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Let's hand it off to Vince Hockett, President of XY Planning Network.



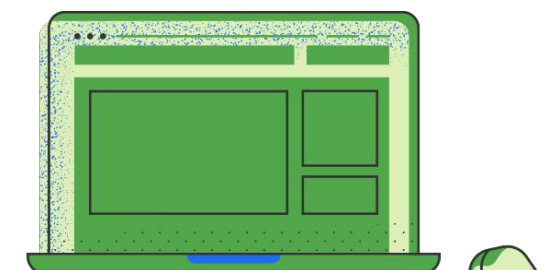
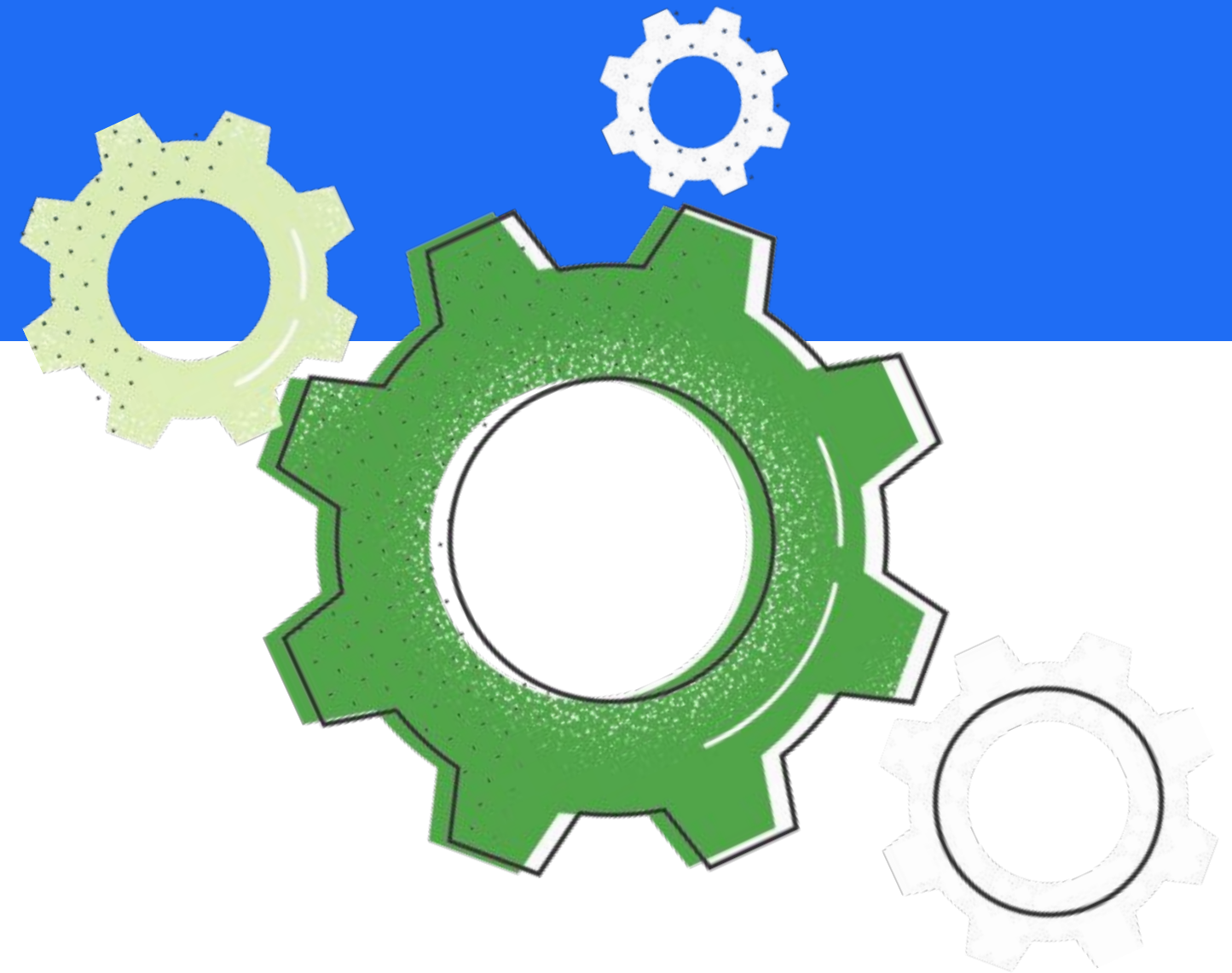


# SCHWAB UPDATE

Integration is on track, and you can expect the wheels to start moving for you in 2023. We suggest you get on the platform now to get a head start!

And, did you know our Schwab partnership includes **discounts** on trades?

- DFA mutual fund trades are **\$9.99**.
- Trade fees for mutual funds (not including reduced funds) are **\$10 off per trade**.



Want to learn more about Schwab?  
**VISIT THE SCHWAB KNOWLEDGE  
BASE ARTICLE FOR INFORMATION**



# XYVA UPDATE

Our XYVA team continues to grow! We just completed a successful alpha phase, and right now we're reaching out to members on the list for the beta phase.

**Want a spot on that list?** Find XYVA at #XYPNLIVE to get connected.







# PASS THE MIC

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Kori Lennon, the Managing Director of Business Solutions, has exciting updates to share. Let's hear it!

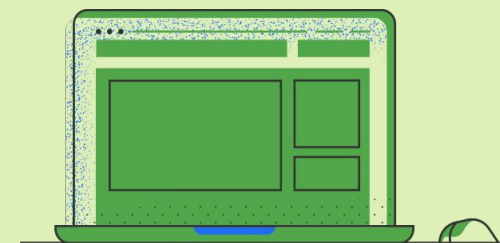




# RIGHTCAPITAL PRICING

As of July 1st, RightCapital increased their prices for all users:

- Basic Pricing increased by **\$15/month**, but is still included in membership for \$0/month.
- Premium is available for **\$40/month**, and Platinum for **\$85/month**
- Additional licenses are now available at the Premium level.



For more information visit the  
**RIGHT CAPITAL KNOWLEDGE BASE ARTICLE**

9

:

75+

**MEET-UPS**

**CONNECTIONS**



# Member Meet-Ups

## Upcoming Meet-Ups:

**Cleveland, OH** | Aug 24 | Michael Kitces | **2 Spots left!**

**Orlando, FL** (FinCon22) | Sep 7 | Chris Johnson & Jillian Berry

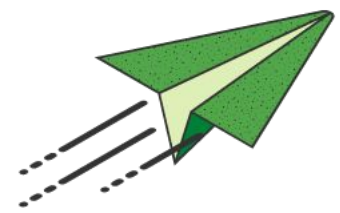
**Atlanta, GA** (AAAFA Vision Conference) | Sep 20 | Chris Johnson & Arlene Moss

**San Diego, CA** (FPA) | Sep 22 | Eli Rickett

**Houston, TX** (FPA) | Sep 29 | Chris Johnson

**SLC** (Riskanalyze Fearless Summit) | Nov 19 | Eli Rickett

**Lafayette, CO** (FPA) | Nov 18



Want to find a meet-up?

**RSVP ON THE MEMBER CALENDAR**







# Catch up with Advisor Education

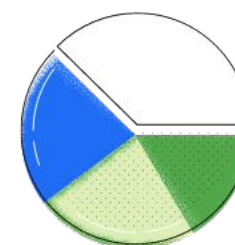
Ready to register or want a recording?  
**CHECK THE MEMBERSHIP CALENDAR**

Some of our **most popular resources**  
from the last few months include:



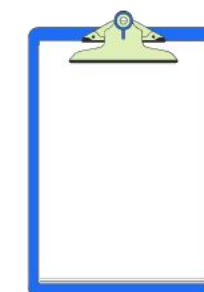
## Health Insurance Planning 101

Self Guided CE and Recording



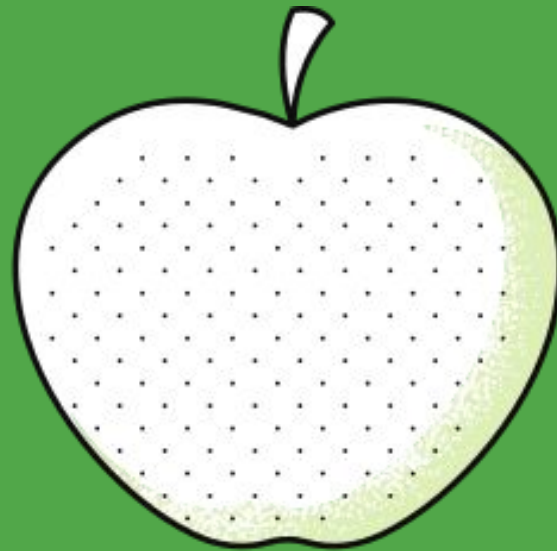
## Understanding Google Analytics

Universal Analytics



## Build Your Client Meeting Process

Webinar and Recording



# INSIDE EXPERTS

## THE FINAL 3

Friday August 26 at 12 PM PT

### **3 Keys to Financial Planning with Prenups**

Kaylin Dillon

Friday September 9 at 12 PM PT

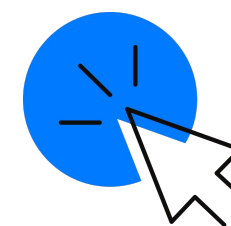
### **Multi-Generational Wealth Planning for Advisors**

Steven Schoenberger

Friday September 16 at 12 PM PT

### **The Financial Mentorship Model: Building a Financial Planning Practice You Love**

Cynthia Meyer



To see which webinars you can earn CFP credits for attending, visit the **[XYPN MEMBERSHIP CALENDAR](#)**

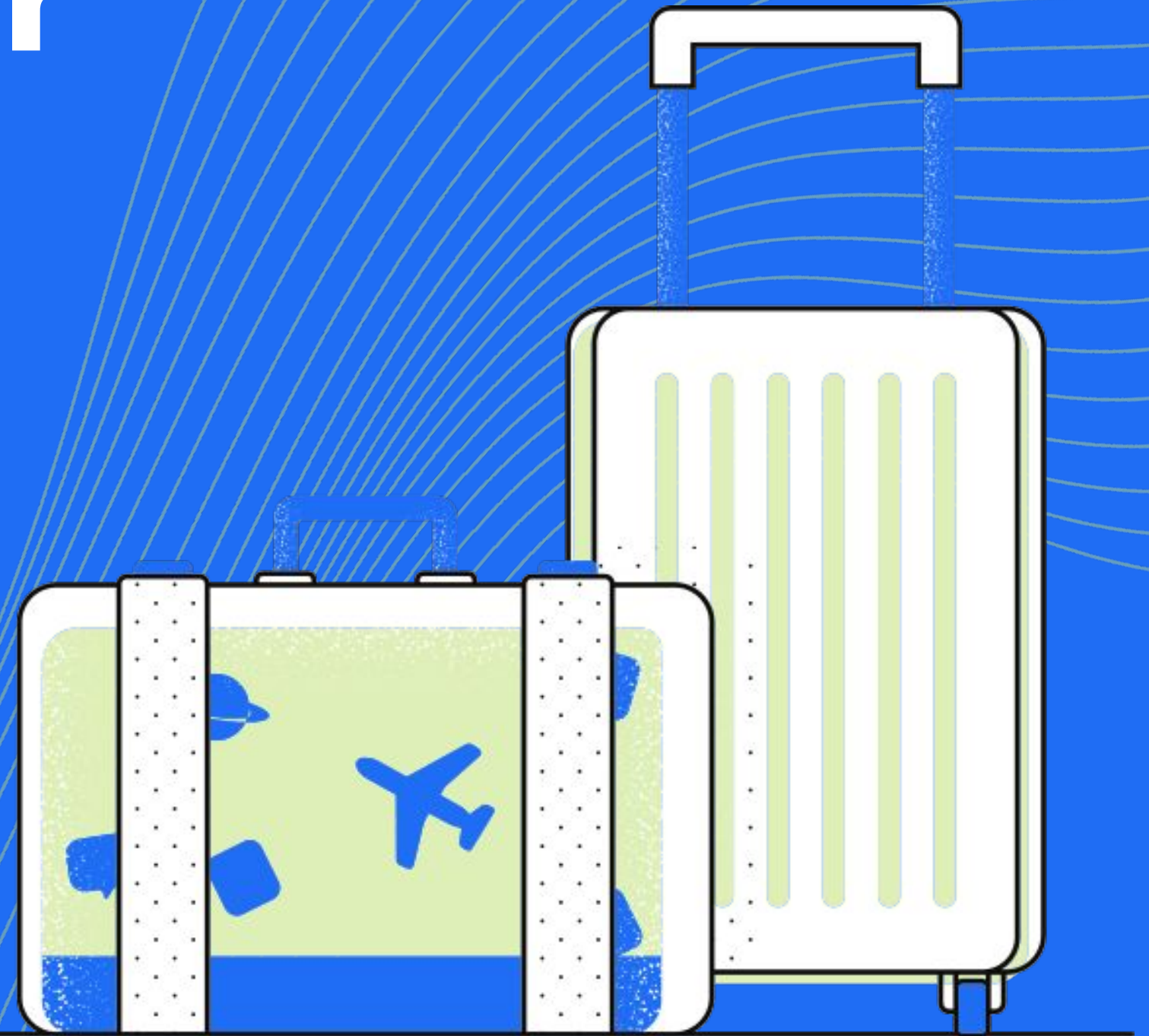
# Conference season is around the corner

This is THE **can't-miss event** for  
fee-for-service financial advisors.

Tickets to #XYPNLIVE are available now. **Grab  
your pass and** come as you are on **October  
8-11**. We can't wait to see you!



Check out all things #XYPNLIVE at  
**LIVE.XYPLANNINGNETWORK.COM**





#XYRNLIVE

# Meet YOUR Keynote Speakers

**re:serve your applause.** There is one more keynote speaker coming your way.

Check the conference schedule for the most up-to-date information.

A portrait of Simidele Adeagbo, a Black woman with short, curly black hair, smiling. She is wearing a white sleeveless top and gold hoop earrings. The background is a solid green color.

**Simidele Adeagbo**  
KEYNOTE SPEAKER

A portrait of Carl Richards, a white man with a bald head, smiling. He is wearing a dark blue button-down shirt over a white t-shirt. The background is a solid green color.

**Carl Richards**  
KEYNOTE SPEAKER

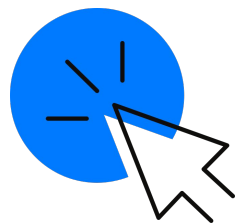


#XYPNLIVE

# Simidele Adeagbo

**Simidele Adeagbo**, 1st African Woman Olympian in Skeleton, will deliver her transformational blueprint from her 100-day journey to Olympian status during her #XYPNLIVE 2022 **keynote**.

We are so excited to learn about **the art of re:invention** with Simidele Adeagbo!



Learn more about Simidele Adeagbo and her keynote in XYPN's recent blog **THE ART OF REINVENTION**



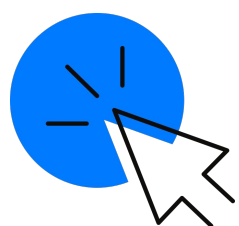


#XYPNLIVE

# Carl Richards

**Carl Richards**, CFP®, creator of "Sketch Guy," will deliver this **keynote** address at #XYPNLIVE 2022.

Carl will start a conversation about what it means to be a real financial advisor. Join us in re:imagining the meaning of your role.



Learn more about Carl Richards  
and his keynote in XYPN's recent blog  
**GETTING REAL WITH CARL RICHARDS**





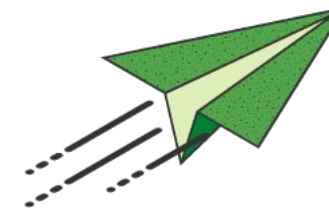
#XYPNLIVE

# Kitces and Carl

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Kitces and Carl—**yes, THE Kitces and Carl**—will be making their rounds at #XYPNLIVE in Denver, CO this October 8-11.

Grab a pass, head into the conference, and snap a pic with these financial planning celebs.



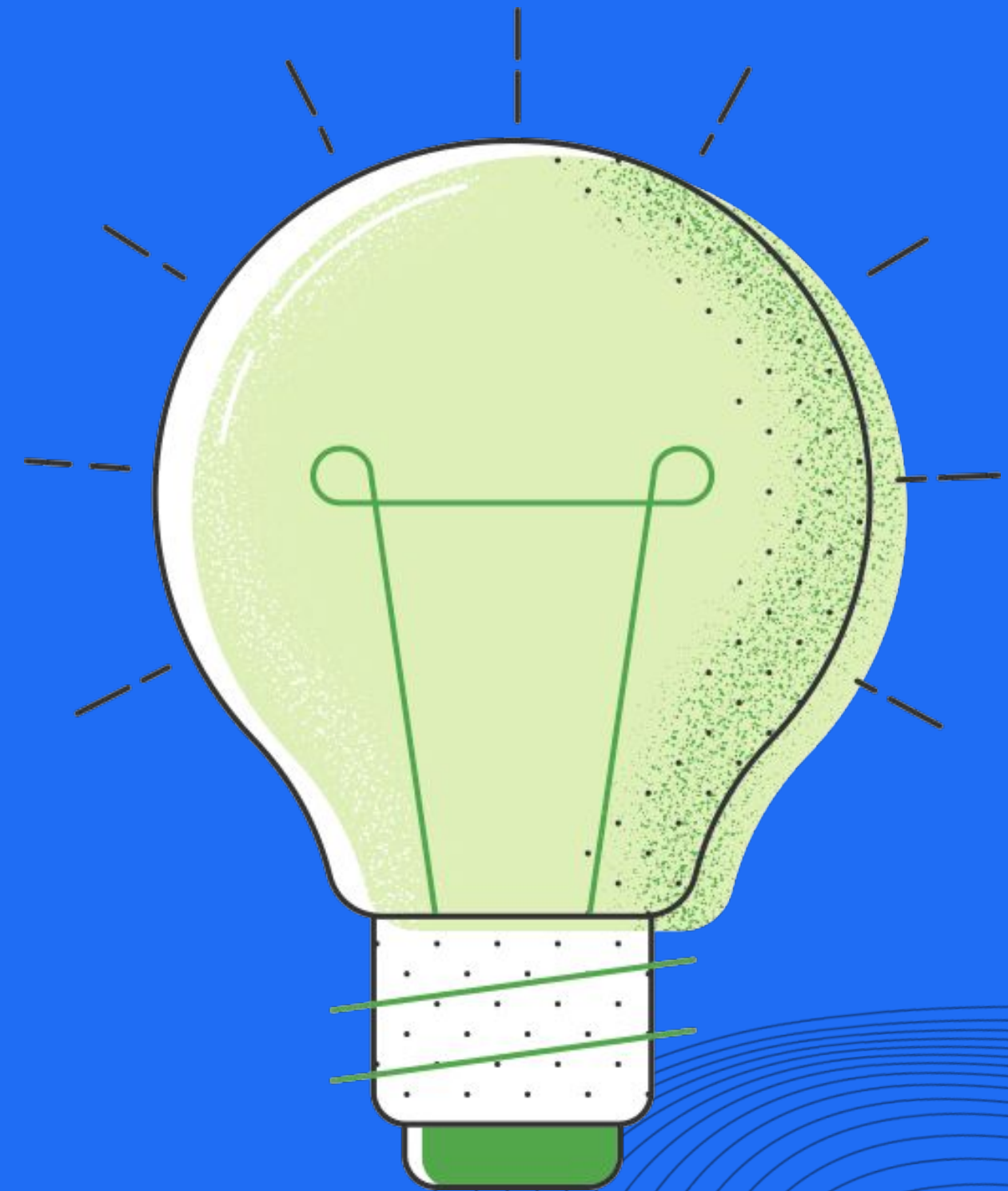
Grab your pass at  
**LIVE.XYPLANNINGNETWORK.COM**



**#XYPNLIVE**

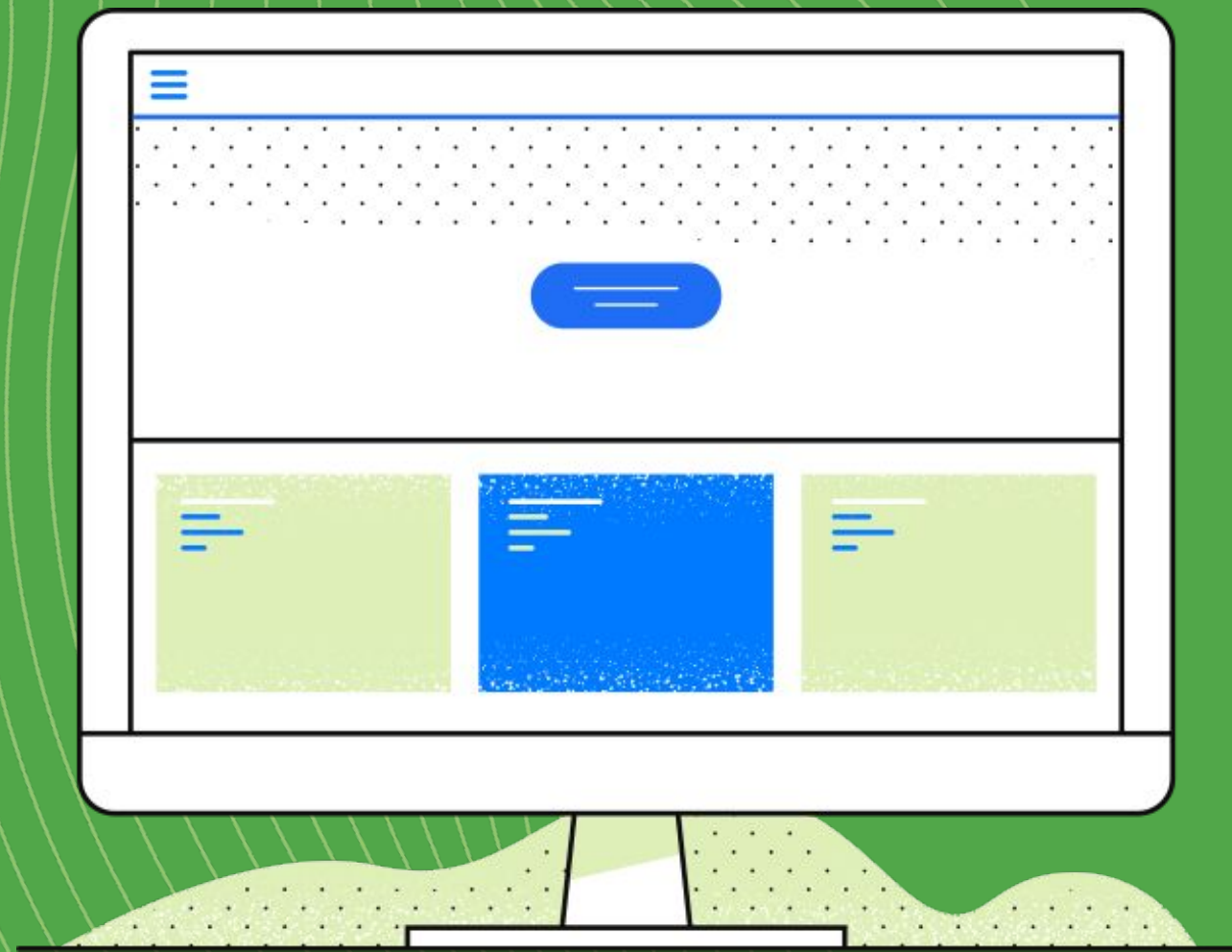
# POLL TIME!

**Should the blue couch make an appearance at #XYPNLIVE?**





# Looking for guidance?



With all of the Pre-Cons, a jam-packed content session schedule, a full Exhibit Day, and one bash of a closing party—you might be left wanting the lowdown on sessions!

**Look no further. We've got you covered.**

We've hand-picked **sample schedules** so you can spend more time getting ready and less time figuring out what sessions fit your firm.

# IF YOU'RE AN ADVANCED FIRM LOOKING TO GROW:



## Scaling Advice

*Successfully Scaling a Multi-Advisor Firm,*  
Aj Ayers and Shane Mason

## Automate and Optimize

*\$0 to \$60M in Three Years: A Case Study on  
Professionalizing your Firm's Management  
Function,* Michelle Walters

## Scaling Advice

*Employee Engagement & Creating a Path to  
the Front Seat,*  
Arlene Moss

## Roundtable

*Growing Your Team to Fit Your Business,*  
Rebecca Conner

# IF YOU'RE A SUCCESSFUL SOLO OR BOUTIQUE FIRM:



## Automate and Optimize

***2 Years of Surge Meetings: Implementation, Rewards, & Challenges,***  
John Mason, Tommy Blackburn, and Ben Raikes

## Scaling Advice

***Taking on a Business Partner to Boost Growth & Serve Clients Better,***  
Dann Ryan and David Flores Wilson

## Sh!t You Should Know

***Emergency Continuity Planning for Advisors,***  
Brooklyn Brock, Bridget Grimes, Jonah Toleno, and Peachie Thompson

## Roundtable

***Improving While Sustaining,***  
Rob Oliver



# IF YOU'RE A BRAND NEW FIRM:



## Automate and Optimize

*Client Onboarding & Service: A Simple, Scalable Blueprint for Startup RIAs,*  
Michael Reynolds

## Client Acquisition

*Question Your Way to New Clients: The Questions that Build Trust & Credibility,*  
Nancy Bleeke

## Client Acquisition

## Livestream

*How to Get The "Yes": A No-Stress Prospecting Process,* Stephanie Bogan

## Scaling Advice

## Panel

*Secrets to Success: Lessons Learned Building a Firm,* Natalie and Dan Slagle, Trent Porter, and Chloe Moore

# Check out this content

## Automate and Optimize

*Solve New Problems with Old Tech: How to Reinvent Your Existing Tech Stack*

Charesse Spiller

## Client Acquisition

*Get Started with Testimonial Marketing*

Carolyn Dalle-Molle

## Sh!t You Should Know

*5 Things Every Investment Advisor Should Have In Place to Avoid Cyberattacks*

Michael Cocanower

## Continuing Education

*CFP® Board Ethics Code and Standards*

Thomas Duffy

## Scaling Advice

*Scaling a Boutique Firm, Fast and with Intention*

Danika Waddell

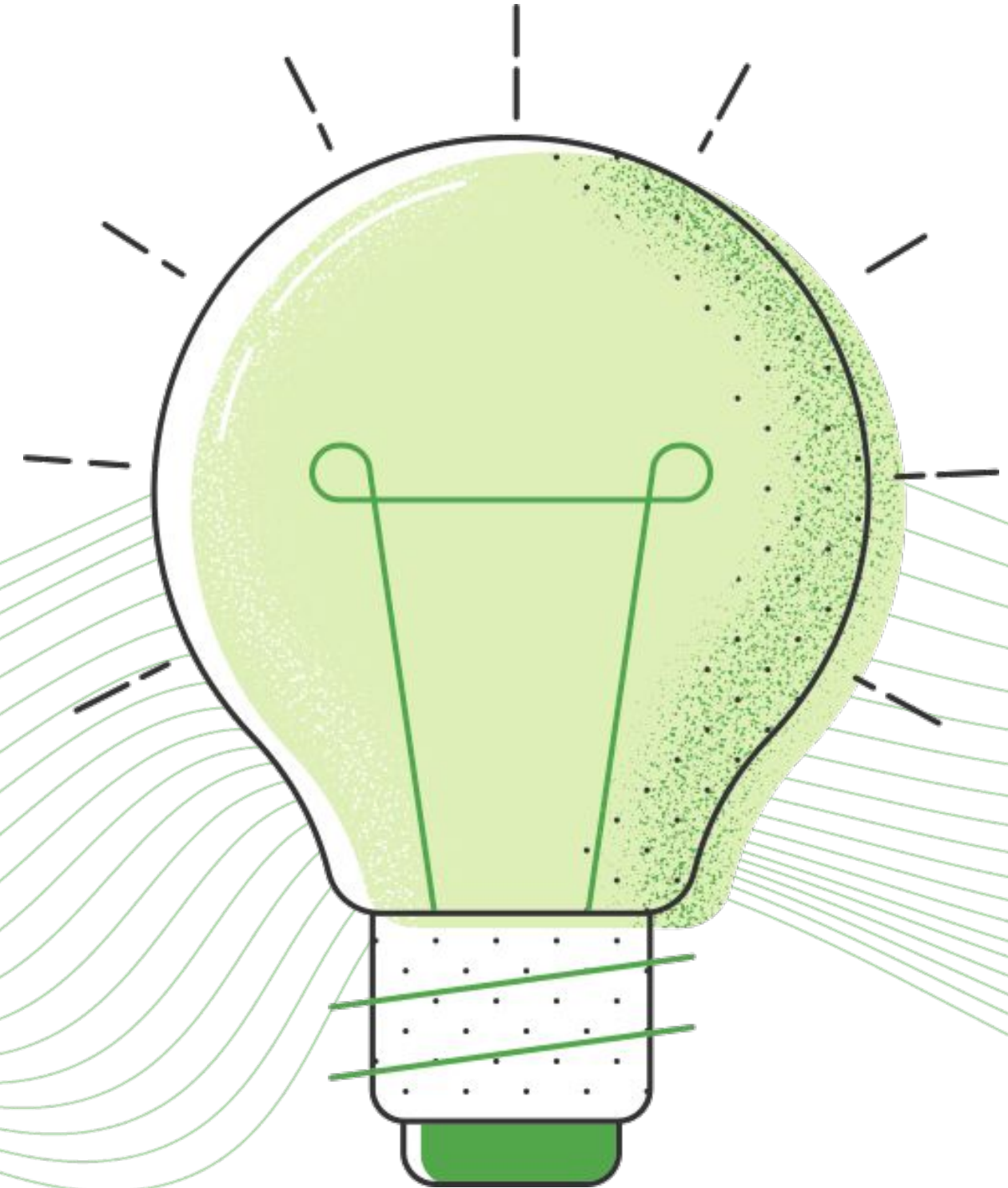
## Deliver Value

*How to Create Financial Plan Deliverables Your Clients Will Actually Read*

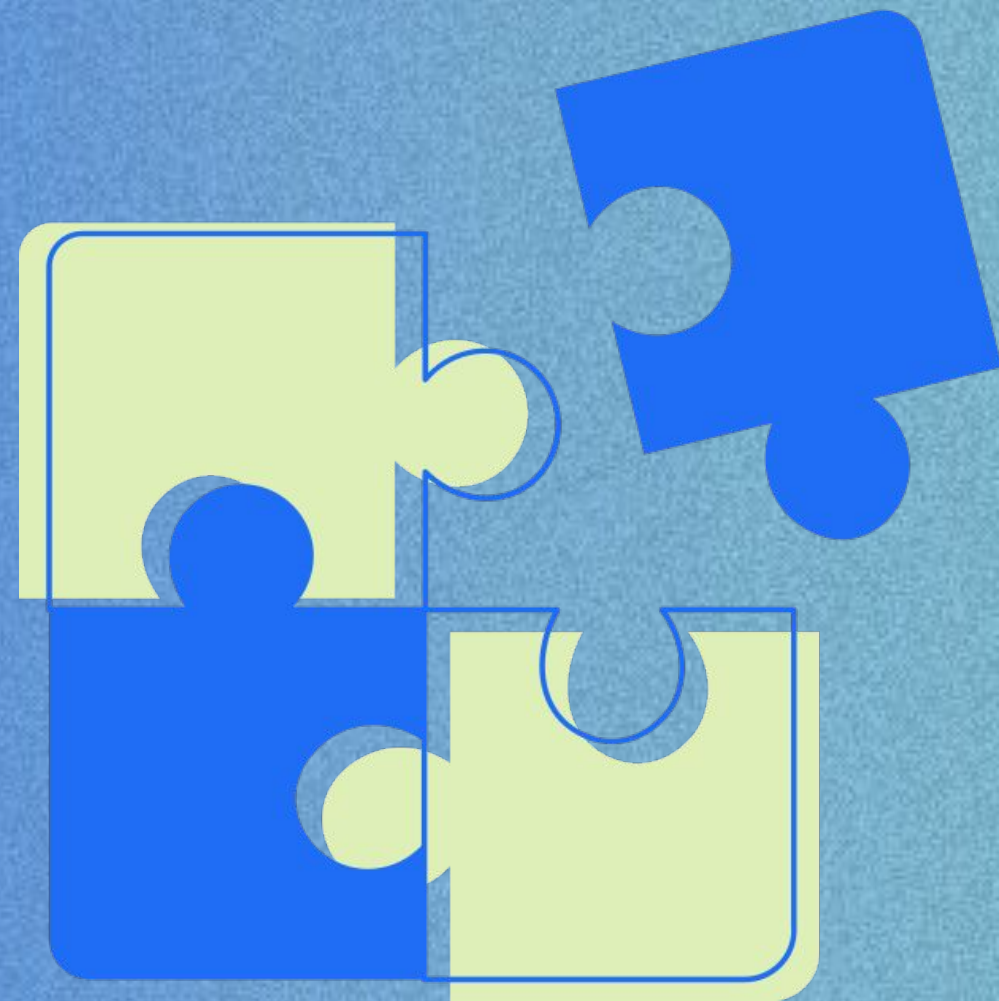
Mike Zung

**POLL TIME!**

What do you need  
right now?







# NETWORKING EVENTS

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Entrepreneurship can be a lonely journey—at XYPN, you're **independent, but never alone** on your path. Let our network become your network at #XYPNLIVE.

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**Roundtables:** Challenges of Race in our Profession,  
Christopher Dale

**Panels:** How to Juggle Parenthood and a Business Without  
Losing Your Mind, Katie Brewer, Pam Horack, & Ben Wacek

**Mixers:** Networking Breakfasts & Lunches

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Join us to in **re:connecting with community.**



Looking to connect ahead of the conference?  
**JOIN US FOR AN #XYPNLIVE LINK-UP!**

#XYPNLIVE



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## WE'RE DOING THE WORK

#XYPNLIVE promotes diversity, equity, and inclusion—and we've been recognized for our work on conference diversity.





# PASS THE MIC

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Maddy Roche, Vice President of Getting Sh!t Done, is on deck. Take it away!





#XYPNLIVE

# CLOSING PARTY

It's not over until it's over—or at least until Alan and Michael bid you farewell.

Join us in celebrating a successful #XYPNLIVE 2022 at the end of **Monday, October 10 7:30 PM MT**. Head on over to **Lucky Strike** to join the fun.

And it's within **walking distance** from the hotel, and two drink tickets will be waiting for you! You won't want to miss this bash.



#XYPNLIVE

# We want to let you in on a secret!



A 2023 sized secret!

For #XYPNLIVE 2023 we'll be **heading south**. That's all we  
can tell you for now—come to #XYPNLIVE 2022 to find out.

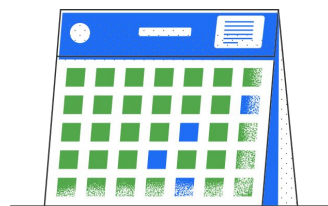




# How to Speak (Publicly)

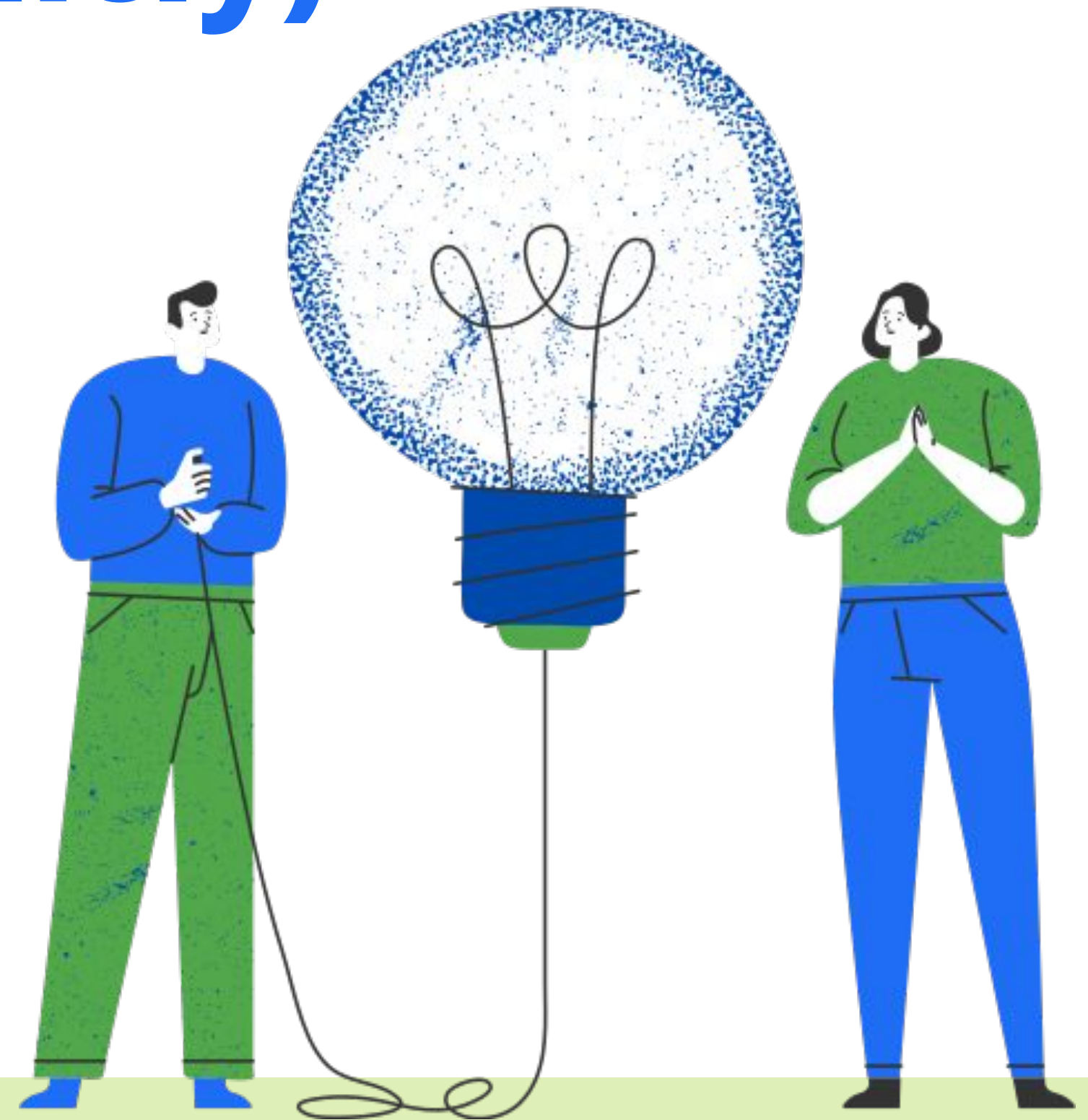
Join Vice President of Getting Sh!t Done Maddy Roche for a presentation on how to best prepare for public speaking opportunities on **Thursday September 15 at 9:30 AM PT!**

Maddy will introduce you to her pro tips on how to **prepare your body, mind, and material** for delivering a captivating presentation.



Register here!

**XYPN MEMBERSHIP CALENDAR**



#XYPNLIVE

# Check out our service lines at #XYPNLIVE

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#XYRNLIVE

# PRE- CONS



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## **Angie Herbers Presents: Business Performance Assessment Workshop**

October 8 at 1 PM MT



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## **College Aid Pro™ Presents: The Future of Financial Aid**

October 8 from 9 AM - 5 PM MT



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## **The Seven Stages of Money Maturity®**

October 7 at 9:30 AM MT & October 8 at 8:30 AM MT



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## **The Perfect RIA Panel of Success**

October 8 at 8 AM MT

**#XYPNLIVE**

# SURPRISE!

**JUST FOR YOU: #XYPNLIVE FLASH PROMOTION.**

**Code: FLASH50 for \$50 off**

This promotion will expire on **Monday August 29 at 5 PM MT**  
so grab your pass at **LIVE.XYPLANNINGNETWORK.COM**



#XFLIVE

# That's not all!

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Don't miss out on staying **close to the action** at Sheraton Denver Downtown Hotel.

Rooms are going fast, so be sure to book your hotel room by **September 16** in order to take advantage of our \$219/night room rate.



# It's AMA o'clock!

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Ready to put us in the hot seat? Submit your questions!

**[WWW.SLI.DO](http://WWW.SLI.DO)**

CODE: **XYPN**

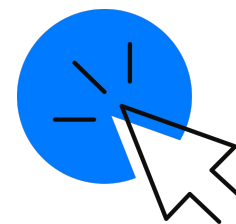




# Last minute round-up

We've changed things up! The **Town Hall recap** will make its way into your inbox on **Friday** in our regular weekly newsletter.

1. Grab your pass to #XYPNLIVE
2. Promote your firm
3. Register for a meet-up (or apply to be an ambassador)
4. Schedule a call with your MES



Our next Town Hall will be LIVE at #XYPNLIVE  
**SEE YOU THERE**