

Michael E. Kitces

MSFS, MTAX, CFP®, CLU, ChFC, RHU, REBC, CASL
Chief Financial Planning Nerd



Biography

Michael Kitces, MSFS, MTAX, CFP®, CLU, ChFC, RHU, REBC, CASL, is the Chief Financial Planning Nerd at Kitces.com, dedicated to advancing knowledge in financial planning and helping to make financial advisors better and more successful, and the Head of Planning Strategy at [Focus Partners Wealth](http://FocusPartnersWealth.com), an independent RIA with more than \$50 billion of assets under management, that provides private wealth management to consumers and [Focus Partners Advisor Solutions](http://FocusPartnersAdvisorSolutions.com), that provides turnkey asset management platform services to advisors.

In addition, he is a co-founder of the [XY Planning Network](http://XYPlanningNetwork.com), [AdvicePay](http://AdvicePay.com), [New Planner Recruiting](http://NewPlannerRecruiting.com), [fpPathfinder](http://fpPathfinder.com), and [FA BeanCounters](http://FABeanCounters.com), the former Practitioner Editor of the Journal of Financial Planning, the host of [the Financial Advisor Success podcast](http://theFinancialAdvisorSuccessPodcast.com), and the publisher of the popular [financial planning continuing education](http://financialplanningcontinuingeducation.com) blog *Nerd's Eye View*.

Beyond his website and many businesses, Michael is an active writer and speaker across the industry, and has been featured in publications including *Financial Planning*, the *Journal of Financial Planning*, *Journal of Retirement Planning*, *Practical Tax Strategies*, and *Leimberg Information Services*, as well as *The Wall Street Journal*, *BusinessWeek*, *CNBC PowerLunch*, *NBC Nightly News*, and more. In addition, Michael has co-authored numerous books, including "*The Annuity Advisor*" with John Olsen (now in 5th edition), and "*Tools & Techniques of Retirement Income Planning*" with Steve Leimberg and others.

Michael is one of the 2010 recipients of the Financial Planning Association's "Heart of Financial Planning" awards for his dedication to advancing the financial planning profession. In addition, he has variously been recognized as financial planning's "Deep Thinker," a "Legacy Builder," an "Influencer," a "Mover & Shaker," part of the "Power 20," and a "Rising Star in Wealth Management" by industry publications. These awards were presented to honor Michael's active work in the financial planning community, including numerous other boards and committees for the Financial Planning Association, the Investments and Wealth Institute, and the Society of Financial Services Professionals, at both the local and National levels. Michael is also a co-founder of NexGen, a community of the next generation of financial planners that aims to ensure the transference of wisdom, tradition, and integrity, from the pioneers of financial planning to the next generation of the profession.



Speaking Topics

- Advanced Roth Conversion Planning Strategies
- An In-Depth Look at Optimal Rebalancing Strategies
- Applying Behavioral Finance in Your Financial Planning Practice
- At the Capacity Crossroads: 3 Visions for Scaling the Advisory Firm You Want
- Expanding the Framework of Safe Withdrawal Rates
- Five Industry Trends Reshaping Financial Advice
- Generating Tax Alpha With Effective Asset Location
- How the Secure Act Changes Retirement (And Other) Planning
- Kitces Research on What Makes Financial Planning More Efficient
- Maximizing Social Security Benefits for Couples
- Rethinking Advisor Marketing to Generate More Scalable Growth
- Rethinking Risk Tolerance for Retiring Clients
- Strategies for Managing Sequence of Return Risk in Retirement
- Tax Efficient Withdrawal Strategies in Retirement
- Trusts as Beneficiaries of IRAs
- Understanding Longevity Annuities and Their Potential Role in Retirement Income

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