



The History of Financial Planning: The Transformation of Financial Services (Wiley Finance)

By E. Denby Brandon, H. Oliver Welch

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The History of Financial Planning: The Transformation of Financial Services (Wiley Finance) By E. Denby Brandon, H. Oliver Welch

The first book to provide a comprehensive history of the financial planning profession

The financial services field has been revolutionized in the last quarter of the twentieth century by the financial planning profession. So much has happened in so little time that it has been difficult to keep up with the events and key players that make up the world of financial planning. *The History of Financial Planning* is the first book to provide a comprehensive history of the profession.

Backed by the Financial Planning Association, *The History of Financial Planning* offers a clear overview of the industry and how it has grown and changed over the years. This book chronicles the history of the profession, with explanations of how the financial planning movement has grown beyond the United States to other countries-particularly in the last fifteen years. The book also demonstrates how the work of key researchers, such as Dr. Daniel Kahneman, Vernon Smith, and Amos Tversky, has influenced the rise of the financial planning profession

- Names "four initial engines of growth" that contributed to the success of financial planning
- Reveals the moments and key players that define the history of financial planning
- Discusses the emergence of the Financial Planning Association (FPA)

The financial planning field has a rich history, and with this book as your guide, you'll quickly discover how it has evolved over the years.



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Editorial Review

Review

"I thank Denby and Oliver for capturing this important history of the people and institutions that created a profession focused on helping people plan and improve their financial situations. Their book contains invaluable recollections from many pioneers and champions of our profession, and it goes beyond recounting past challenges and achievements to identify key themes and issues that we must continue to address."

—Kevin R. Keller, CEO of CFP Board

From the Inside Flap

Four decades ago, the financial planning profession did not exist. For average Americans, an "investment" meant a life insurance policy, bought from an insurance salesman who worked on commission. That was all changed by a onetime vacuum-cleaner salesman who had transformed himself into a marketing consultant and motivational writer, and a former insurance salesman turned school-supplies salesman who had a master's degree in psychology. In late 1969, they began a revolution that was intended to help ordinary Americans gain control over their financial destinies. Despite huge odds, financial planning—the first new profession in four centuries—succeeded beyond the most fervent hopes of its founders, not just in the United States but around the world. *The History of Financial Planning* is the story of that astonishing success and the people who built the movement.

In vivid detail, the authors chronicle the defining moments and the key players that have made up the history of financial planning. They depict the environment out of which the financial planning movement emerged and offer an inside look at the watershed December 1969 meeting in Chicago that launched the movement. They introduce the cast of characters—which included visionary, courageous, and talented people, a majority of whom put the movement ahead of their personal goals. And they detail the formative years from the early 1970s through the 1980s, the landmark events of the 1990s, and the new era that began with the birth of the 30,000-member Financial Planning Association in 2000.

In addition, the authors cover the global expansion of the financial planning movement, the interaction of financial planning research and new technologies, and the emerging growth of financial planning as a profession: education, examination, experience, ethics, methods of compensation, government regulation, and social purpose. They conclude their saga with an outline of what possible challenges and opportunities the financial planning movement will face in the future.

As financial planning enters its fifth decade, it is clear that much of its potential and promise are being realized. This book will convey the heart, soul, and tireless commitment that have added to the depth and richness of this profession.

From the Back Cover

Praise for the history of financial planning

"Congratulations to Denby, Oliver, and the FPA for capturing the spirit and determination of the pioneers who made financial planning the global profession it is today. While organizations, qualifications, and standards make a profession, it's individuals of strong heart and stout will that truly bring it to life."

—Noel Maye, CEO, Financial Planning Standards Board Ltd.

"Without the dedication, enthusiasm, and commitment of Denby Brandon and Oliver Welch, it's fair to say the international financial planning industry would not have progressed so far, so fast. They played a critical role in extending the profession far beyond America's shores, helping us to establish financial planning Down Under. It is my great pleasure to endorse this history, which is a credit to them and everything they and their colleagues have achieved."

—**Gwen Fletcher**, pioneering leader in bringing Financial Planning to Australia, recipient of the 2009 Award from Queen Elizabeth as a member of the Order of Australia (AM) for her services to Financial Planning

"In order to understand the present and forecast the future, it is essential to study the past. The History of Financial Planning does an excellent job of weaving individuals, institutions, and events together to form a colorful tapestry that accurately depicts the development of this emerging profession."

—**Tom L. Potts**, Professor of Finance and Director of the Financial Services and Planning Program, Department of Finance, Insurance and Real Estate, Hankamer School of Business, Baylor University and President-Elect, Financial Planning Association

"Denby and Oliver have compiled a fascinating, comprehensive look at the first four decades of the financial planning movement. As memories start to fade, their excellent work will serve as a valuable resource to those guiding financial planning into the future."

—**Dale E. Brown**, CAE, President & CEO, Financial Services Institute, Inc.

Users Review

From reader reviews:

Sally Oneal:

The book The History of Financial Planning: The Transformation of Financial Services (Wiley Finance) gives you the sense of being enjoy for your spare time. You can use to make your capable much more increase. Book can being your best friend when you getting pressure or having big problem with your subject. If you can make looking at a book The History of Financial Planning: The Transformation of Financial Services (Wiley Finance) being your habit, you can get far more advantages, like add your capable, increase your knowledge about a few or all subjects. You are able to know everything if you like wide open and read a reserve The History of Financial Planning: The Transformation of Financial Services (Wiley Finance). Kinds of book are several. It means that, science guide or encyclopedia or other individuals. So , how do you think about this guide?

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Paul Cockrell:

In this particular era which is the greater man or woman or who has ability in doing something more are more important than other. Do you want to become one of it? It is just simple way to have that. What you have to do is just spending your time little but quite enough to experience a look at some books. One of several books in the top listing in your reading list is The History of Financial Planning: The Transformation of Financial Services (Wiley Finance). This book that is qualified as The Hungry Inclines can get you closer in getting precious person. By looking upwards and review this publication you can get many advantages.

Sheri Combs:

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