

The Atlanta Journal-Constitution

Seminar designed to offer a wide range of advice

By Gene Tharpe

STAFF WRITER

Something for everyone. "That's what we wanted to do in planning the Money&More Investment Seminar," said



William Kring, president-elect of the Georgia Society of the Institute of Certified Financial Planners.

The ICFP and The Atlanta Journal-Constitution are partners in planning and presenting the Money&More seminar and, said Kring, "I think we have a unique seminar" in the services it provides attendees.

"We are bringing a wide range of topics to the public," he said. "We wanted information and education that could be used by the young and the old, the novice or the experienced investor, to help

them with their financial planning needs."

And since these needs differ, Kring said, the ICFP worked with the newspaper to ensure the presentations would be varied, objective and balanced, and that the speakers and advisers would be a combination of local certified financial planners and ICFP members and nationally known financial experts and writers.

For example, said Kring, mutual funds are such "a huge area of interest now for so many people" that Morningstar Inc., the best-known analyst and ranker of mutual funds, was a logical choice. "We have Don Phillips, its CEO, as a keynote speaker, and you can't ask better than that," he said.

Beyond the high quality of the speakers and wide range of topics to be discussed, Kring said what makes the seminar unique is the opportunity for "action" it offers

to attendees.

"A big part of financial planning is information and education, but also taking action on that information and education," he said. To help individuals decide what action they need to take, ICFP members will staff an Ask the Adviser Room, where certified financial planners will provide free, brief consultations.

The Georgia chapter of the ICFP is one of the largest in the nation, with approximately 350 members. To earn the certified financial planner designation, individuals must meet education, examination, experience and ethics requirements established by the Denver-based Certified Financial Planner Board of Standards.

CFPs also must complete 30 hours of continuing education every two years in subjects such as estate planning and tax planning.