Fi360 CONFERENCE

APRIL 3RD - 5TH 2019 NASHVILLE, TN

Michael Kitces, MSFS, MTAX, CFP®, CLU, ChFC, RHU, REBC, CASL
Partner & Director of Wealth Management, Pinnacle Advisory Group

Michael E. Kitces, MSFS, MTAX, CFP®, CLU, ChFC, RHU, REBC, CASL, is a partner and the Director of Wealth Management for Pinnacle Advisory Group, a private wealth management firm located in Columbia, Maryland that oversees approximately $1.8 billion of client assets. In addition, he is a co-founder of the XY Planning Network, AdvicePay, and New Planner Recruiting, the former Practitioner Editor of the Journal of Financial Planning, the host of the *Financial Advisor Success* podcast, and the publisher of the popular financial planning continuing education blog *Nerd's Eye View* through his website www.Kitces.com, all dedicated to advancing knowledge in financial planning.

Beyond his website, Michael is an active writer and editor 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 3rd edition), the first balanced and objective book on annuities written for attorneys, accountants, and financial planners, 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, which currently includes serving as a member of the Editorial Review Board for the Journal of Financial Planning, national chair of the Financial Planning Section for the Society of

Financial Services Professionals, and numerous other boards and committees for the Financial Planning Association and the Society of Financial Services Professionals at 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.