

Fuse 2017 Profile: Michael Kitces



In the months leading up to Fuse 2017, we're profiling the event's panel of judges. This week's profile is Michael Kitces, partner and Director of Wealth Management at Pinnacle Advisory Group.

Michael Kitces has spent the last seventeen years in the financial services industry. His passion for learning and sharing his knowledge with others led him to launch "The Kitces Report" - an educational newsletter for financial planners - and his popular blog, *Nerd's Eye View*. Michael is also a co-founder of the XY Planning Network.

Michael's Background

Like many of us, Michael Kitces didn't always have his sights set on finance. He spent his undergraduate years at Bates College, where he earned a degree in Psychology with a theater minor and a pre-med concentration. Upon graduation, having decided only that he didn't want to pursue psychology, theater, or medicine, he landed a job as a life insurance agent - a pivotal role that introduced him to financial planning.

Michael spent the rest of his twenties earning two master's degrees, one in Financial Services and another in Taxation. He also pursued numerous designations and certifications, all while working full-time as a financial planner. He started at Pinnacle Advisory Group in 2002 as their Director of Financial Planning, and later became a partner in 2012.

In 2008, Michael started "The Kitces Report." He expanded his educational efforts by launching his blog in 2010. In addition to his blog, Michael is regularly quoted

in the Wall Street Journal, Businessweek, Investment News, and more. He is also a popular public speaker at more than fifty industry events each year, and co-authored *The Annuity Advisor* and *Tools & Techniques of Retirement Income Planning*.

In 2010, Michael was awarded the Heart of Financial Planning Award by the Financial Planning Association. The award, given for outstanding achievements in the profession, is one of the industry's highest honors.

Today, Michael spends the majority of his time producing content for *Nerd's Eye View*, which has been recognized as the most popular blog for financial advisors.

Looking Back to Last Year's Fuse

This is Michael's third year as a Fuse judge. He loves the "hack-a-thon, collaborative spirit" of Fuse and says the conference is essential for bettering industry technology.

"If we're going to get better-integrated technology in the financial planning industry, the companies need to work together," said Michael, "which means the programmers - those building the technology - need to spend more time together, get to know each other, and make connections - that's what Fuse is all about to me. It's an opportunity for connection and collaboration."

Looking Ahead to September

For Fuse 2017, Michael is looking forward to seeing integrations with Orion's new rebalancing software, Eclipse™.

"Knowing Orion is coming out with Eclipse™, and the incredibly prominent role that rebalancing software has in the industry, I'm excited to see what's going on with Eclipse™," said Michael. "I'm curious what ideas and integrations will come together and build around the rebalancing side of Orion on top of their portfolio accounting software."

Michael is also interested in seeing new automations driven by Orion triggers,

and their role in making advisors more proactive.

“How can we take the real-time flow of new data and not just show live reports, but actually trigger notifications and automate actions so we can more proactively do something to help our clients?”

Finally, he is also eager to see more from the two-time Best in Show Award winner, RIA in a Box.

“I don’t think most people give credit to compliance software as something that would be driving technology innovation, but RIA in a Box has been doing some really cool stuff, and so I’m curious to see what they come up with this year!”

Fuse 2017 is the premier conference for financial services technology developers and programmers. For more information about this year’s event, visit fuse2017.com or keep up with us on Twitter using the **#FuseUtah** hashtag.

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