

DUNTON

Loren E. Dunton Lifetime Achievement Award

Honoring the Recipient

The Loren Dunton Lifetime Achievement Award is made, in honor of the founder of the financial planning profession, Loren Dunton, to each person who has made a substantial contribution to the financial services profession and/or the financial interests of the public.

Father of Financial Planning

Loren Dunton, generally regarded as the "Father of Financial Planning", organized financial professionals in the late sixties. In 1969 he convened a group of financial professionals in Chicago and founded an industry of outstanding service and commitment. From this event and from Dunton's leadership and interactivity with many persons now in the IARFC would come an educational institution, the College for Financial Planning and the personal financial planning curricula now taught on over one hundred campuses.

As the first editor of Financial Planning magazine Dunton helped to publicize an emerging profession, bringing various practitioners together for a common cause, sharing practice and marketing techniques and promoting ethical conduct. That respected magazine has continued contributing to the profession for thirty years. Two associations came initially from this effort, the International Association for Financial Planning and after the first class of Certified Financial Planners graduated in 1973, the Institute of Certified Financial Planners. These organizations have since merged to become the Financial Planning Association. Using Dunton's model, more than forty countries have formed similar organizations.

Dunton continued to promote the value of the financial consultant as a professional whose quest for knowledge should never cease. He authored seven books that have helped to shape the careers and services of financial consultants. Dunton's commitment to these principles was evidenced in the Institute for Consumer Financial Education that he nurtured for many years, and which earned a Presidential Citation for public service.

Criteria for the Dunton Lifetime Achievement Award

Those who are considered for the Award must currently meet or have met the following criteria:

- Hold a professional designation or credential (i.e. RFC®, MRFC®, ChFC, CFP®, CLU, CPA/PFS, EBS, MSFS, or Doctoral degree, etc.)
- Published articles, journals, books, etc. on financial topics
- Provided outstanding service or leadership in the financial services industry
- Promoted or participated in some aspect of financial education, either to the public or to members of the profession
- Demonstrated effectiveness in carrying the message of responsible financial stewardship to the public
- Adherence to the IARFC's Code of Ethics and have a sound record of business integrity with no suspension or revocation of a professional license

2024 Nomination Committee (Year of Award)

Chair, Kai Yuan Tu, RFC® – (2020 Recipient)

Alan C. Kifer, MRFC® – (2023)

Monroe Diefendorf, Jr. RFC® – (2021)

Barry L. Dayley, CFP®, MRFC® – (2020)

Rosilyn Overton, Ph.D. LUTCF, CEBA, CEP, CSA, MRFC® – (2019)

William Gustafson, Ph.D. – (2018)

Ric Edelman, RFC® – (2017)

Jerry Mason, Ph.D. – (2016)

Jon M. Rogers, Ph.D., CLU, ChFC, MRFC® – (2015)

Bill Carter, CFP®, ChFC, CLU, RFC® – (2006)

A Very "Noble" Calling

Having been a successful businessman, although never a financial consultant, his comments were from the heart.

He used his experience to frankly explain back then, what we recognize now, that...

Planning is not separate from the "sale" of insurance and investment products, but are different roots of the common tree.

Products are necessary elements in the implementation of the financial plan.

Salesmanship should be taught by the managers and trainers of the financial services industry.

The ethical sale of financial products and the delivery of competent advice is a very noble calling.



Nominees for the 2024 Loren E. Dunton Lifetime Achievement Award

Use this form to nominate a recipient for the Loren Dunton Lifetime Achievement Award, presented annually to a person who has made significant contributions to the financial services profession and to the public. This form may be supplemented with additional information of your choosing. Nominations close on September 30, 2023.

Nominee

Name: _____ Nickname: _____

Address/City/State/Zip: _____

Phone and email: _____

Current position/title: _____

Firm/organization/institution: _____

Professional designations: _____

of years in a financial practice or firm: _____

Publishing credentials: _____

Positions of Service or Leadership in the financial services industry: _____

How has this person promoted or participated in financial education either to public or the profession? _____

How has this nominee carried the message of responsible financial stewardship to the public? _____

Why should this person be considered for the award? _____

Nominator

Name: _____ Nickname: _____

Address: _____

Phone and email: _____



Submit completed form:
Email: awards@iarfc.org
Mail: IARFC Loren Dunton Award Committee
International Association of Registered Financial Consultants
P.O. Box 506
Middletown, OH 45042