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Finance 3060

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Paige Johannessen Reflection

Ms. Johannessen gave a remarkable presentation that consisted of multiple topics. The most important topic she integrated in her presentation was explaining what the day in the life of a financial planner looks like. She gave us real examples from her own career that illustrated just how close a financial planner can become with their clients. In one example, she mentioned she attended a funeral of a client that had just retired, and in another example told the class about the gentleman she talks to about the market every Wednesday for 45 minutes. Ms. Johannessen also gave the class insight on prepping for the CFP exam, the importance of networking, and the advantages students in the LSU CFP program have.

Ms. Johannessen was able to incorporate certain subjects we have discussed in class into her presentation. She hit the topic of ethics and doing what is right for your client no matter what the compensation looks like between the alternatives available. That was a topic that we strongly discussed in class. Another topic that she mentioned was the financial planning process. She assured us that the concept is applied in real life and demonstrated the process by talking about it and showing the class a binder full of questions for the client to fill out.

One question that was asked that I found interesting was “How did you prepare for the CFP exam, and do you wish you would have prepared differently?” This is the question we all wanted to know since we are in this class for the purpose of taking the CFP exam. Ms. Johannessenn replied, “I studied for at least 40 hours a week for 4 months, and I wish I would have studied longer.” A second question asked was, “How is your firm structured?” Since only a few students are currently working in the financial planning industry, that was a question that was extremely useful to the majority of the class. She replied by explaining to us that the firm is layered just like any business, and she also jokingly told the class that if you become successful like Mr. Shobe, you get to play more golf than work.

In my personal opinion, I think it would be a good idea to bring Ms. Johannessen back next semester to speak. Because of her age and her contagious personality, Ms. Johannessen did an excellent job of relating to the class and putting on a great presentation. She was also able alleviate many concerns the class had about the CFP exam and what it takes to pass it. Overall, she was an excellent guest speaker.