

# Voice

## A Swan Song



Marvin W. Tuttle Jr., CAE, is former CEO of the Financial Planning Association.

I've been very fortunate, and am most grateful to live what seems to me to be an unusually rich and blessed life.

On top of the many wonderful layers of my life's cake, which include God, family, country, and many, many, good friends, professional peers, and acquaintances, is a haute layer of icing comprising some very special ... to the point of truly unique, individuals.

Marv Tuttle is, and for many years has been, a very significant ingredient

in that extra tasty icing atop my life's cake. I more than suspect that I'm not alone in these sentiments.

Marv's success as a long-time, trusted, and yes, seminal leader in the financial planning profession's powerful emergence derived in large part I believe, from his understated style and always empathic presence. Irrespective of his renowned abilities to join full force in our play and antics, the specifics of which are far too numerous and in some instances too colorful for mention here, Marv has remained steadfastly gracious and graceful in his relationships.

It is that all too rare quality of human grace that renders Marv so metaphorically and literally worthy of this heartfelt, if inadequate and belated, attempt at a swan song remembrance.

Thank you Marv, from the bottom of my heart for allowing me and my family and my professional friends and peers to bask for so long in the warmth and comfort of your grace and graciousness.

May many more be so fortunate to know you in the years to come!

— Guy Cumbie, CFP®  
President/CEO  
Cumbie Advisory Services, Inc.  
Fort Worth, TX

### Not a Panacea for Clients

Dan Moisand often brings well-thought ideas ("Who Would You Recommend?" January 2013 *Journal*). This particular idea is counter-productive. The efforts of FPA to bring true professional status have been floundering for years. Attempts to create something akin to the bar exams or to medical board exams is not only doomed, but also not very helpful.

As a board certified eye surgeon, I have witnessed numerous surgeons who passed the three-part, multi-day, written/practical/oral exams and yet would not be worthy of practicing on your pet. And there are numerous ones who have failed the exams who were excellent clinicians.

Achieving the CFP designation is similar. We have all seen those who are not competent or [are] unethical. That is not to say the designation is not helpful. However, it is not the panacea for our clients we sometimes imagine. And the wirehouse brokers, now called financial advisers, are and should only be recognized as sales people. Nothing wrong with that.

We should find a better a way [to] distinguish our profession. Mercantilism is not going to help.

—Mitch Levin, M.D., CWPP, CAPP  
CEO and managing director  
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