

Journal of Financial Planning®

The *Journal of Financial Planning* publishes academically rigorous, advanced research papers on all aspects of financial planning through a double-blind peer-review process. Consider the elements below to give your paper its best chance of succeeding through peer review to publication.

Audience

Keep *Journal* readers—primarily experienced financial planning professionals—in mind as you write. Provide timely, practical material that applies to, or will directly benefit, financial planners in their work. Assume the reader has a fundamental but not esoteric knowledge.

Length

Manuscripts should run approximately 5,000 words.

Format

Each author's name, contact information, and a brief biography (30–50 words for each author) should be included on the cover page. For blind peer review purposes, the second page should consist of the title and an executive summary of no more than 250 words, but no identifying information.

Style

The *Journal of Financial Planning* uses The Chicago Manual of Style as a guide for formatting, writing style, and references. Your writing style should be easy to read and follow, yet professional. Thoughts and concepts should be clearly presented and easy to comprehend. Examples that illustrate key points are encouraged.

1. Avoid the use of first-person narrative, when possible. For example, rather than: "I added an unconstrained variable to the model," write: "An unconstrained variable was added to the model."
2. The review of literature and presentation of results should generally be written in past tense. For example, writing: "Grable (2013) presented findings regarding past portfolio performance" is preferable to: "Grable (2013) presents findings . . ."

Organization

Start the paper with an executive summary no longer than 250 words, presented as a bulleted list.

Early in the paper, state the paper's purpose, the material it will cover, and why that material is important to financial planning professionals.

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Include a literature review of previous research on which the paper builds, and explain how the paper differs from and adds to the existing literature.

Clearly explain the methodology and identify the datasets used in all analyses. Clearly summarize the paper's key findings or recommendations and practical implications for financial planners. How does your work impact how financial planners do theirs?

Objectivity

Content should be objective and avoid mentioning or promoting specific financial products or services. Any statements or assertions should be supported by sufficient research and data.

Charts, Graphs, Tables, and Infographics

Visual material and graphics should not be excessive in length or in number (no more than five), and should support, illustrate, or directly report relevant data and results from the research.

Endnotes/References

The *Journal* uses in-text citations, endnotes, and references/bibliography. Keep the reader in mind when including endnotes and references/bibliography, ensuring that what is included is pertinent to what is in the text. Clarity and readability are the main criteria for inclusion. Endnotes should include URLs when possible. If you include works in your references that informed your research but are not cited in your manuscript, please note them as such in the bibliography.

Examples of references:

Articles: Last Name, First Name [subsequent authors are First Name, Last Name]. Year. "Article Title." *Publication Title* 1 [volume] (2) [issue]: 22–32 [page numbers].

- Blanchett, David M., and Larry R. Frank. 2009. "A Dynamic and Adaptive Approach to Distribution Planning and Monitoring." *Journal of Financial Planning* 22 (4): 52–66.
- Grable, John E., and Sonya L. Britt. 2011. "An Investigation of Response Bias Associated with Electronically Delivered Risk-Tolerance Assessment." *Journal of Financial Therapy* 2 (1). <http://jftonline.org/journals/jft/article/view/1347>.

Books: Last Name, First Name [subsequent authors are First Name, Last Name]. Year. *Book Title*. Nth ed. City: Publisher.

- Fithian, Scott, and Todd Fithian. 2007. *The Right Side of the Table*. Denver: Financial Planning Press.

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- Lennick, Doug. 2010. *Financial Intelligence*. 2nd ed. Denver: FPA Press.

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Editorial staff screens manuscripts for appropriateness and quality, and may suggest revisions before sending a manuscript to double-blind peer review.

Authors are notified of the editorial staff's decision generally within three weeks of submitting it for consideration.

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Manuscripts with merit will be reviewed by members of the *Journal of Financial Planning's* peer-review board. The initial screening and double-blind peer-review process takes approximately three to six weeks.

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