RELATIONAL MONEY LLC

FINANCIAL THERAPY SKILLS 101

WHO CAN PARTICIPATE?

Financial Therapy Skills 101 is designed for financial planners (e.g., CFP®), financial counselors (e.g., AFC®), and money coaches (e.g., CDMM®). No previous experience necessary.

WHO CAN BENEFIT?

You will be taught to engage with your clients in more holistic, theoretically-driven, and evidence-based ways. The goal is more than client retention and satisfaction, it is improving you and your client's overall well-being.

WHAT CAN I EXPECT?

The course is 2 hours long meeting weekly for 4 weeks (8 total hours). Each week will consist of an education component on a topic, a demonstration of the skill set, and group practice where you will go into breakout rooms and practice it yourself. The instructor will offer coaching in each breakout room.

WHAT WILL BE COVERED?

Content and skills will focus on evidence-based practices that influence client and advisor outcomes including:

- Empathy, validation, and listening skills
- Asking good questions
- Your money story and your clients
- Theories and tools of behavior change
- Mediating family/couple conflict
- Trauma-informed financial planning
- And more!

COSTS AND SERVICES

Cost is $350 per person for the entire course. Discounts and custom courses available for groups of 6+. Hourly coaching available after the course is taken for skill refreshing and consultation.

CEU

Course is approved for 8 hours of CE credit through AFCPE. Course does not currently fulfill CE credit for CFPs. Other requests for CE handled on a case-by-base basis.

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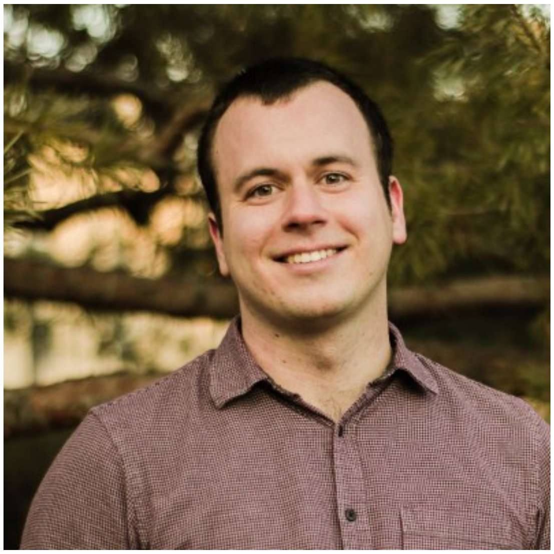
MEET THE INSTRUCTOR

People and money are my two biggest passions and my whole professional identity has revolved around helping people experience their money and relationships in more holistic and positive ways.

I have a master's degree in Couples and Family Therapy from Kansas State University with an emphasis in financial therapy. As a member of the board of directors at the Financial Therapy Association, I've been able to work with some of the best minds in the field and be featured in numerous outlets like CNBC, USA Today, TD Ameritrade, Acorns, and several other major outlets for my work in financial therapy. I've also published work in the *Journal of Financial Therapy* and *Contemporary Family Therapy*.

My hope is to take the skills I've gotten working as a therapist and help financial advisors learn how to help their clients really engage with their money differently. Quite frankly, I'm out to change the field of financial advising to be more client-focused. It is a helping profession, just as therapy, teaching, nursing, and medicine are. As such, advisors have the responsibility and opportunity to engage with their clients on a more personal level and to examine the many systems that affect financial and personal outcomes. That is my personal goal for this course, along with my own continued learning.



HAVE QUESTIONS?

I'm happy to address questions and talk about financial therapy, Relational Money, couples and money, future of financial planning, or whatever is on your mind!

Feel free to reach out at relationalmoney@gmail.com and check out my website at www.relationalmoney.com

Also please connect with me and my company at:

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