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Facilitating Financial Health: Tools for Financial Planners, Coaches, and Therapists

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This new guide presents a new model for helping clients achieve balanced and healthy financial lives- called integrated financial planning. It combines the interior, emotional aspects of finance with exterior financial knowledge and provides the advisor with an expanded set of tools for working with clients to create and maintain financial health. Facilitating Financial Health integrates the fields of psychotherapy, coaching, and financial planning, equipping financial professionals with techniques to enhance their effectiveness by working with both the exterior and interior aspects of a client's financial health. Integrated financial planning encourages you to think beyond the traditional boundaries of your practice and to serve clients far more effectively. Includes a "Decision Tree" with guidelines for deciding when it is appropriate for planners to work with client's interior issues themselves and when it is appropriate to refer clients to or partner with coaches or therapists. Praise for Facilitating Financial Health "This is an essential handbook written by some of the most experienced and eloquent experts in the new field of Integrated Financial Planning. Reading Facilitating Financial Health is like taking a multi-day workshop with master facilitators. Each chapter contains fresh insights into client challenges and practical how-to's for facilitating positive change." Susan Bradley, CFP Founder of the Sudden Money Institute "Facilitating Financial Health provides the knowledge, tools, and guidelines needed to be a catalyst of positive change. I highly recommend this book." Carol Anderson, M.S. Founder and President, Money Quotient "Facilitating Financial Health is a book to help the helpers financial professionals, debt counselors, life coaches and psychotherapists to help their clients." Richard Trachtman, Ph.D. Director, MORE Services for MOney & RElationships "If you want to help clients overcome destructive financial habits and dysfunctional belief systems, then this book will be an invaluable resource. A must read for all change agents!" David B. Yeske, CFP Past President, Financial Planning Association "This is a must read for any professional helping a client on a life or money issue, as these issues are so intertwined." Hugh Massie Author of Financial DNA: Discover Your Unique Financial Personality for a Quality Life "No financial planner, money coach, debt counselor, or money therapist should be without this valuable resource." April Lane Benson, Ph.D. Founder, Stopping Overshopping, LLC "Klontz, Kahler, and Klontz, regarded as pioneers in the field of money matters, offer us long overdue insights into helping our clients understand and change their self-destructive money behaviors. Courtney Pullen, M.A., LPC CEO, Pullen Consulting "An exciting exploration of the interface between two dynamic fields finance and psychology." Pat DeLeon, Ph.D., J.D. Former President, American Psychological Association

Facilitating Financial Health: Tools for Financial Planners, Coaches, and Therapists Details

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From Reader Review Facilitating Financial Health: Tools for Financial Planners, Coaches, and Therapists for online ebook

Halpern Financial says

Quick and easy to read, this textbook concentrated a wide breadth of information into a small space. Our firm came away with several takeaways to understand where clients are coming from and to help guide them toward healthy financial behaviors. The textbook includes resource pages that advisors are encouraged to use with their own clients.

Saul Gonzalez says

Very inspiring and brings a new light to financial coaching and how therapy and financial planning emerge to help people become more aware of their behaviors. How to change their negative thinking and emotions and how to begin to help people become more empowered!
