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Facilitating Financial Health: Tools For Financial Planners, Coaches, And Therapists (Books24x7. Financepro)



Synopsis

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.

Book Information

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Customer Reviews

This is an excellent book for financial planning professionals. As a registered investment advisor and comprehensive financial planner, I found this book to be invaluable to enhancing my practice. I believe that I have better tools for working with clients and their emotional/psychological issues

relating to money. Since we all seem to bring out own special emotional connections to money, it's important for a financial advisor to know how to help clients flesh these out - and when an advisor should bring in a therapist. I am looking forward to reading other books by the Drs. Klontz and Rick Kahler to help me learn how to provide better financial life planning and serve my clients with integrity.

Financial advisors...pay attention, you need this book and the information & methodology. Even if you already have a life planning practice, this resource is valuable. Thank you Brad for creating this excellence resource.

The books is very easy to understand and hits core issues with behavior and money. The interior and exterior of it, and ways to approach getting to the facilitating of both. Approaching money with only the practical aspect does not work as effectively as when you use both inner and practical applications and approaches. Great book. Great read. Great guidance.

I am a psychologist in San Diego with a practice focused on Financial Health. This book provides a great deal of practical advice and wisdom for practitioners in this field. John McConnell, PhD, PSY10673 San Diego[...]

This was a required book for a class I took. I really enjoyed this book. It was entertaining as well as informative.

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