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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. 320 Pages. Available May 2008.

**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®&#x2122; &#x2122; 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®&#x2122; &#x2122; 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

## Book Information

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## Customer Reviews

Probably the most concise and clear books I've read on financial health with a wealth of relevant information. I wish this book had been the required reading for my financial counseling course in college.

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.

very good book for professionals. i really love it ! clear guidelines for many situations. thank you very much !!!

practical information

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

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 [...]

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