



Certified Cash Flow Specialist™ Allan Duncan Says Cash Flow Planning Provides Extra Value for both Clients and Referral Sources

December 8, 2015 Halifax, NS – Certified Cash Flow Specialist™ (CCS™) Allan Duncan says Cash Flow Planning allows him to bring a new level of value to both his clients and referral sources. In his words, the best part about being a CCS™ is "being able to support the different level of referral sources that I currently enjoy in my business [realtors, advisors, planners] as well as being able to offer with comfort a greater level of service to those clients who are seeking a better lifestyle."

He says that Cash Flow Planning allows his clients the pleasure of interacting with their dreams on a regular basis and that's precisely why it's such an important service.

"Cash Flow Planning provides clients with the answers to their spending dilemmas and still allows them to feel free to enjoy the important aspects of their lives - living!"

This freedom comes from the fact the each Cash Flow Plan is customized around the particular client's goals and dreams.

"Each client and each situation is different and Cash Flow Planning provides a different solution for each individual. You will get from the planning exactly what you want as it is tailored to your individual circumstances and dreams. It's your own roadmap for your life today, not just for a particular point in your life such as retirement," he says.

Duncan is also a Certified Financial Planner, and Mortgage Associate. When we asked what initially attracted him to the CCS™ Designation, he says he was interested in "adding another level of experience, qualification and expertise that better supports my business model and that of my referral partners."

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About the CCS™

[The Certified Cash Flow Specialist™ \(CCS™\) Designation](#) is the first program of its kind in Canada. Since its launch in November 2013, Financial Professionals in almost every province have received the CCS™ Designation. Certified Cash Flow Specialists™ are tested for competency in the use of cash flow formulas, behavioural spending concepts, debt management, and on the review and creation of written cash flow plans. Designates must meet continuing education requirements, as well as follow a professional code of conduct. In order to renew the designation, qualified professionals will have their skills put to the test by completing an annual case study and will be required to prove they are actively and regularly writing cash flow plans for their clients. The CCS™ is worth 30.75 CE credits from the Institute for Advanced Financial Education.

The CCS™ program is managed and owned by The Money Finder. Find out more about The Money Finder <http://themoneyfinder.ca/>

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