



Certified Cash Flow Specialist™ Says Cash Flow Planning Gives Her Clients the Tools to Fully Enjoy Their Wealth

August 6, 2015 Halifax, NS – Certified Cash Flow Specialist™ (CCS™) Deborah Wallis has been in the financial services industry for nearly two decades and she says that the process of Cash Flow Planning truly allows her clients to enjoy their wealth.

"Over the years I have had many clients ask me if they could just give me their paychecks and receive an allowance. In the past, I had to smile at this, but now I have a proven method to share with them on how I can essentially do just that—and help them to get more life from the money they have."

As a CCS and Certified Financial Planner (CFP), Wallis has been helping clients manage their money for years but she says, the process of Cash Flow Planning differs from budgeting because it is not about restriction. Rather, it is about helping people to understand how much they can comfortably spend on the things they care about.

"With a Cash Flow Plan, the client can rest assured that the really important life goals they shared with us will be tended to by the plan, and they can decide how to comfortably spend the rest of their money."

Wallis says that many Canadians wish they knew more about managing their financial lives, and this is partially due to the fact that we don't learn about money management in school.

"Unfortunately, the system—as it is set up now—almost always causes people to fail financially right out of the gate."

Initially, she says the Cash Flow Planning software was what attracted her to the CCS Designation. With the software, financial experts are able to quickly and efficiently create written plans for clients to follow. Wallis says the software allows her to use a professional but easy-to-understand method for presenting the information she wants to share with clients.

"I truly believe that all of us in the financial services industry should be making Cash Flow Planning a mandatory step in our process. And when we do that, it will be a huge turning point toward increasing wealth and confidence for all Canadians."

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/>

Contact:

Ryan MacPhail

Director of Enrollment

M: (902) 497-5456

rmacphail@themoneyfinder.ca

www.themoneyfinder.ca