



New Certified Cash Flow Specialist™ Says Cash Flow Planning Helps Beneficiaries Manage Gifts

November 4, 2015 Halifax, NS – Certified Cash Flow Specialist™ (CCS™) Mary Mason's practice, Your Estate Matters Ltd., is focused on estate and trust planning and administration. She says that the process of Cash Flow Planning allows her to help clients maintain and grow their estates, while also helping beneficiaries manage their gifts properly.

"Parents are often concerned about how their children will deal with receiving a significant amount from their estate, often like winning the lotto; having a process to help people manage their funds and relieve the concerns of parents—I think is a great addition to my offering."

Mason says she was attracted to the CCS™ Designation because Cash Flow Planning is not often a focus in the financial training programs that are currently offered. Unlike budgeting, Cash Flow Planning helps to show people exactly where their money is going. In other words, rather than focusing on restrictions, Cash Flow Planning helps clients reach their true financial goals by empowering them with a sense of greater financial awareness, and simultaneously simplifying their daily spending and saving.

"Managing your cash flow helps to provide funds for growing your assets, and takes the stress out of the day-to-day management of your funds," Mason says.

She adds that Cash Flow Planning takes the stress off of her clients because they are able to "understand where everything is going and they don't have to worry about surprises creeping up."

If you are wondering whether Cash Flow Planning is right for you, Mason suggests a brief discussion to assess your situation. "In most cases, the process can help clients find a lot of money they didn't know they had."

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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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