

Financial Professional says The Certified Cash Flow Specialist™ Designation Helps Her Clients' 'Wealth Health'

October 22, 2014 Halifax, NS – "We generally all have control over how our money is being spent day-to-day but are we mindful of the leakage that is affecting our overall wealth health?" asks Judy Jenkins, co-owner of Lighthouse Money Management in Goderich, Ontario.

The Certified Cash Flow Specialist™ Designation was created because Money Finder CEO, Stephanie Holmes-Winton, felt that there was a missing piece of the puzzle in financial services. She saw that certain clients would have to make behavioural changes in order to make the most of the money they had, but that this would be impossible without their advisors giving them the tools to make changes and without the insight they needed into their daily spending habits.

Jenkins says she first heard Holmes-Winton when she was speaking on a CBC radio interview. "She was expressing her frustration over the lack of education on how to 'spend' our money appropriately." Jenkins says that she remembers thinking to herself that there was finally someone who could provide advisors with the tools to provide advice on their daily spending and how it can impact their long-term goals.

As an advisor who truly cares about her clients, Jenkins is committed to ensuring that her clients understand their own 'wealth health.' This concern mirrors the mandate of the Certified Cash Flow Specialist™ Designation because the goal of all CCS™ professionals is to take into consideration the client's unique values and goals and to structure a plan based on their vision for the future. This method, in turn, increases plan implementation because the motivation is emotional. Clients can truly get a sense of *why* they should follow the plan—because they're fulfilling their own goals and dreams.

Jenkins says she is thrilled to become one of the first Certified Cash Flow Specialists™ because it means she has "the ability to provide guidance to young and mature people on how to get the most out of the money they already have."

About the CCS™

The Certified Cash Flow Specialist™ (CCS™) Designation is the first program of its kind in Canada. It recently launched, November 2013, and there are currently Financial Professionals who have received the CCS™ Designation in almost every province. 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™ program is managed and owned by The Money Finder. Find out more about The Money Finder <http://themoneyfinder.ca/>

Contact:

Stephanie Holmes-Winton,
CEO of The Money Finder and founder of the CCS™

26 Morningfield Lane
Dartmouth NS, B2W 0J6
(902.229.1112)
assist@themoneyfinder.ca
www.cashflow-specialist.com