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Financial Health Not Just About Numbers

Mission Financial Planning, Inc. attended the annual meeting of the Financial Therapy Association; insights promote client financial health, well-being.

Mission, KS (PRWEB) October 26, 2012



Mission Financial Planning, Inc. recently attended the annual meeting of the Financial Therapy Association which helps finance professionals work to achieve the "integration of cognitive, emotional, behavioral, relational, and economic aspects that promote financial health." (financialtherapyassociation.com) Over 100 participants attended sessions with topics as diverse as student financial literacy, the use of EMDR in dealing with financial crisis, financial interventions and helping clients stop over-shopping.

Keynote speaker, NY Times blogger and author of The Behavior Gap, Carl Richards proposes first establishing a life plan: "whatever you have to do to gain self-knowledge, do it. Find out who you are and what you want. Then you can stop wasting your life energy and your money on stuff that doesn't matter to you—and start making financial decisions that will get you to your true goals." He proposes linking each "financial decision to one's well-thought-out life goals...." so that "each person's financial situation becomes unique, because their goals are unique. It's no longer about abstractions like a secure retirement or college education—it's about your vision of retirement and your child's education." Keeping up with the Jones seems a silly exercise when one's own life plan comes clearly into focus.

Another conference speaker's work, Susan Zimmerman, developed Mindful Asset Programs -- an assessment tool to help clients understand their underlying motives and emotions when relating to money and life. She outlines eight "money rascals" designed to raise psychological self awareness about money and financial behavior. The goal again is to get clear about one's own issues with money then realign to develop behavior patterns that can lead to a more genuine financial fitness.

Tonya Thomas Kennedy, MSW, MBA, attended the conference on behalf of [Mission Financial Planning](#). A member of the Financial Therapy Association, she observed "As financial planners, we all agree that logic and rationality provide solid underpinnings for life's decisions. But in decision making, human interactions and in life generally, people tend to show themselves to be emotional creatures more often than not." Mission Financial Planning's process incorporates an understanding of both aspects of client decision making.

When guiding clients to make responsible decisions about their financial affairs, [Mission Financial Planning's](#) advisors help clients become aware of any underlying emotional and psychological issues. It is their experience that even small insights promote financial health, well-being and peace of mind.

[Mission Financial Planning](#) is a fee-only financial advisory firm that creates and monitors financial plans for dentists, specialists and their families. The firm takes a comprehensive approach, consulting on personal and small practice financial planning with clients across the U.S. For more information call 913-948-9694 or visit <http://www.missionfinancialplanning.com>.

Fee-only financial advisors are compensated solely by the client with neither the advisor nor any related party receiving compensation that is contingent on the purchase or sale of a financial product.



Tonya Thomas Kennedy, MSW, MBA Associate Planner

“ It's no longer about abstractions like a secure retirement or college education—it's about your vision of retirement and your child's education. ”

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