



Certified Cash Flow Specialist™ Says Cash Flow Planning Benefits Clients of all Income Levels

March 4, 2015 Halifax, NS – Certified Cash Flow Specialist™ Lyle Lee, co-founder of Morgan National Corporation, works with families of all ages to serve their insurance and investment needs, and now he also offers strategic Cash Flow Planning as a way to assist clients with their financial priorities.

Lee says that the process of Cash Flow Planning helps his clients to prioritize their spending and saving. "It is very important as it gives people an understanding of where their funds are going."

The process serves high-income clients because it is not a restrictive process. Unlike budgeting, Cash Flow Planning helps to show people exactly where their money is going. In other words, rather than focusing on restrictions, Lee can help clients to reach their true financial goals by empowering them with a sense of greater financial awareness.

As a professional in the Financial Services industry for two decades, Lee focuses on helping his clients to gain a fuller understanding of the way they manage their savings and purchases.

"Giving people the knowledge to handle finances at the earliest stage in life is to their advantage," he says.

Lee first encountered the founder of the Certified Cash Flow Specialist™ Designation, Stephanie Holmes-Winton, during a presentation sponsored by Manulife Bank. He says the concept of Cash Flow Planning appealed to him because he knew it would be a valuable service with significant financial benefit for his clients.

In addition to helping families with their financial management, Lee also works with a number of small to intermediate sized businesses in Calgary. He says that with the CCS™ Designation he has developed his expertise and was able to transfer his cash flow management skills "to teach businesses and clients that free cash flow is essential to enhance lifestyle in all areas. Proper management of each Cash Flow Plan will enable clients to redirect funds, resulting in quicker debt repayment and greater savings for their futures."

Lee says, "Cash Flow Planning is right for everyone, no matter what their income level."

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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