

CCS™ Christian Jaehn-Kreibaum Finds CCS™ Designation Builds Client Loyalty

April 15, 2014 Halifax, NS - Christian Jaehn-Kreibaum says cash flow planning has increased the loyalty of his clients. His long-term personal assistant, Jodi Milligan, has also noticed the difference, "In many instances, you end up finding that they have additional investments at another location that they, in turn, transfer to you." As cash flow planning helps clients with their everyday saving and spending, clients feel a sense of support from an advisor who offers the service—they can see that their advisor truly cares about their lives.

Milligan also notes the increase in client referrals after Christian obtained his CCS™, "To be honest," she says, "it feels good to help someone realize their goals are attainable. It feels even better to show them those goals can be attained years earlier than they thought possible."

Jaehn-Kreibaum says, "As an Advisor running a holistic Financial Planning practice, I realized a few years ago that something in my practice was missing. I asked myself: *What does it help clients, if they have all their investments and insurance correctly set-up with a nice dependable income and strategies to minimize taxes, if they can NOT handle their cash flow or have a functional Cash Flow Plan in place?* It's like being a superb athlete but missing the guidance of a coach!"

Christian says he finds that clients today second-guess advisors more than they would have in previous decades, "Clients try to find their own answers or solutions on the internet for their investments and financial planning." In response, he has implemented social media into his daily practice. "Clients and prospects today are on the internet and they will Google your name. You, as the advisor, have to be online, or you can miss out on opportunities."

The CCS™ Designation is unique as it fosters online engagement with those who undertake the designation by listing all CCS™ Professionals in an online database and, additionally, by featuring advisors in individual press releases, all with the intention of allowing clients to easily locate a Certified Cash Flow Specialist™ in their area.

Christian says "Stephanie and The Money Finder Team triggered my increased awareness and investment into marketing."

Christian mentioned that cash flow planning allows him to free up both time and money for clients. He says, "By implementing and strictly trusting the process and functionality of a cash flow plan, business owners and other individuals will free up time." On average, he finds that he saves between \$500-\$2,000 per month for clients.

In his words, "Something was missing in my services and the CCS™ closed the open gap."

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 9 Financial Professionals who 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™ program is managed and owned by The Money Finder. Find out more about The Money Finder <http://themoneyfinder.ca/>

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