



First Certified Cash Flow Specialist™ in Saskatoon Says Cash Flow Planning Allows Her To Plan With the Whole Picture in Mind

May 5, 2015 Halifax, NS – Being the first Certified Cash Flow Specialist™ (CCS™) in Saskatoon means a lot to Sarah King because her clients mean a lot to her. She says Cash Flow Planning builds deep bonds and client loyalty because "you truly have changed their lives and in a lot of cases—their personal relationships with their spouse and children."

King says that she knew early on in her career in the financial services industry that she needed "to plan with the whole picture in mind, rather than just sell product." She says she always tried to do this type of work with clients but it's much more streamlined now that she has incorporated the CCS™ process into her practice.

The process begins when King meets with clients to discuss their financial goals and dreams. "I'm more confident that the plans I suggest for clients align with their goals, because we talked about what is important to them and designed the plan around them."

From there, King says her clients feel that the daily financial stress has been removed from their lives. "We go back to the basics, take away the worry and over-thinking about day-to-day spending and just focus on doing what they love to do every day."

King says she is passionate about listening and problem solving and both skills translate into her work. Her advice matters to her clients because they know she has built their plans with their individual goals in mind. "Clients now call me before making major purchases and we talk it through," she says.

She says that even though the basics of Cash Flow Planning are crucially important, the concepts are not taught in school. "Everyone has cash flow and by not talking about how to manage income and day-to-day expenses, clients are left to hope and pray that they are making the best choices to avoid financial trouble."

King loves working with young families because it allows her to empower them with the tools they need in order to talk about cash flow and reach their goals.

"I wanted to become a CCS™ because cash flow is vital to our daily lives! It only makes sense that when I am working with a client to put retirement savings in place and planning for unexpected life events, like a critical illness or death, that we also discuss how their current cash flow plays a part in securing these insurances."

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/>

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