



Certified Cash Flow Specialist™ Bev Large Says a Cash Flow Plan is an 'Action Plan' Allowing Clients to Reach Their Goals

December 17, 2015 Halifax, NS – Bev Large says Cash Flow Planning has yielded many aha-moments for her clients and provided her with a user-friendly solution that allows clients to reach their goals.

"The stress of '*do I have enough to go on a vacation?*' is released once that goal has an action plan behind it - the Cash Flow Plan is the 'action plan'. Clients are now following the plan and are happy and confident that their goals are attainable," she says.

She says the Cash Flow Planning Software is key because it allows her to present clients with a written plan that is easy to explain and follow. Additionally, she is able to use the software in the initial assessment process to determine whether Cash Flow Planning is right for the potential client's circumstances.

"I am upfront with asking for financial information to aid in the assessment process and the clients have been forthcoming with providing it," she says.

Large initially heard about the CCS Designation during a seminar hosted by The Money Finder CEO, Stephanie Holmes-Winton. She says that many of the concepts Holmes-Winton presented were akin to the processes she was incorporating into her practice, or planning to implement.

"I was trying to create a spreadsheet and educational seminars to help both my clients and myself with their cash flow habits. When I heard Stephanie's seminar, it had many elements that I had created and other elements that were in my plan to develop. Then, the realization that the CCS designation was recognized by MFDA became the credibility that I needed to move forward with the process."

She says the best part about being a CCS™ is that it allows her to remove the daily stress from her clients' financial lives.

"Cash Flow Planning is a tool that teaches us how to make informed decisions with our money. I have both experienced and witnessed the school of thought, *pay bills and make your money last until your next cheque* - and it keeps people poor. "

As a CCS™, Large says she is able to not only reassure clients that she's always looking at advancing her skill set in order to assist with their financial portfolios, she's also able to offer a

user-friendly solution to their question, “How can I make my money last until the next pay cheque?”

Contact:

Bev Large
PO Box 19517 South Cranston RPO
Calgary AB
T3M 0V4

Phone: (403)-512-1183

Fax: (403)-764-1599

Website: stellarmoneymatters.com

Email: bevlarge@shaw.ca

LinkedIn: ca.linkedin.com/in/bevlarge

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/>

The Money Finder - Contact:

Ryan MacPhail, CSO

M: (902) 497-5456

rmacphail@themoneyfinder.ca

www.themoneyfinder.ca

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