

CCS™ Says Cash Flow Planning Truly Benefits High-Income Clients Who Already Excel

March 2, 2015 Halifax, NS – New Certified Cash Flow Specialist™ Mary Keetch says Cash Flow Planning benefits her high-income clients greatly, "What I have found is that clients that need Cash Flow Planning are typically well-educated, earn a high income, excel in their industry but are so busy doing what they love that they welcome the opportunity to understand and implement a written Cash Flow Plan."

As Cash Flow Planning fundamentally differs from budgeting, Keetch says it allows her to help clients avoid common financial mistakes. "When I see prospective clients for the first time, we go through a rigorous Q&A. It breaks my heart to see people that have fallen into common pitfalls only because they didn't know what they didn't know. It can mean saving thousands, if not hundreds of thousands, of dollars."

Cash Flow Planning is appropriate for her high-income clients because rather than focusing on restrictions, Keetch is able to focus on her clients' true financial goals.

"Cash Flow Planning is not budgeting, it is not judgemental. It's only about 'You', understanding 'Your' priorities and assisting 'YOU' to get where you want to be without all the stumbling blocks of guessing what's right or wrong along the way. I see clients that are debt-free, ones just starting out, and everything in-between."

She says the best part of being a Certified Cash Flow Specialist™ is being able to help clients articulate their priorities, "Listening to what's important to them and then writing a Cash Flow Plan, providing education and a specialist in the financial industry to weed out all the pitfalls to get them to their goals."

Keetch adds, "When I discovered the opportunity to be the first Certified Cash Flow Specialist™ in London, to implement a tried-and-true process and provide clients with a written plan and the commitment to work alongside them in the years to come—to see them achieve a much higher result than they would otherwise, I was on board immediately."

As a Certified Cash Flow Specialist™, Keetch has changed her practice by implementing the process of Cash Flow Planning in conjunction with using the software that allows her to create written plans for current clients and new clients.

"Why isn't every financial advisor doing this? By making smaller smart decisions everyday you can make a phenomenal impact for your future."

As a financial professional who cares, Keetch has always taken an interest in helping to spread financial literacy, "I have always felt it was an important part of my process to help people understand their money. We are not taught this skill in school or anywhere else for that matter. I believe clients can progress so much further if they can skip the common pitfalls that many experience without advice."

She stresses to potential clients that Cash Flow Planning is not only highly effective, it is also a simple process. "Prior to asking for your full commitment, I will give you ballpark figures as to the extent a Cash Flow Plan can benefit you and yours. You don't have to stumble through, you can excel, thrive, and make greater strides."

Nothing beats the comfort of having an expert to guide you, "I look forward to many future celebrations with clients who participated in a Cash Flow Plan and now are getting more life from their cash flow."

[Connect with Mary here!](#)

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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