

New Certified Cash Flow Specialist™ Says the Designation Allowed Him to Join a Community of Like-Minded Advisors

May 26, 2014 Halifax, NS – Steve de Blois, a recent CCS™, says the Designation has allowed him to connect with a group of like-minded advisors, people who are truly interested in helping their clients. He cites many reasons that becoming a Certified Cash Flow Specialist™ has improved his process but says the best thing about the designation is "knowing there is a network of other CCS™ who want to help their clients and from whom I can draw from to get help in unique situations."

He credits Money Finder CEO, Stephanie Holmes-Winton, for streamlining the cash flow planning process to create the designation and connect advisors from across Canada.

As Holmes-Winton says, "I knew when the team at The Money Finder made the commitment to bring this program to life that we couldn't produce people who just passed exams and paid dues. We needed to help create financial superheroes."

CCS™ advisors can log in to Tribe Central, an online forum, to connect or meet in person during the annual CCS™ Conference which will be open to all advisors—whether they've completed the designation or are considering implementing cash flow planning and interested in hearing from professionals who have already taken that step.

De Blois says he mentions having clients with unique financial situations because he is situated in Alberta, "Living in Oil County, where the average household income is about double of the national average, often people have larger homes, bigger boats and all the toys. With cash flow planning they can understand and harness their daily cash flow and still live the good life they desire."

The Money Finder also recently launched cash flow planning software, Money Finder™ Pro, allowing advisors to input figures into their software and create cash flow plans for clients much faster. De Blois says, "having a structure and software to address cash flow has become a big part of my process."

In the end, de Blois says it's all about his clients. "Cash flow is King! If you can harness cash flow, you can get way more out of your personal goals whether you want a new car, to pay down debts or have an early retirement."

He adds, "I just love my clients! Being able to help them that much more, means the CCS™ program is well worth the money it costs!"

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 Financial Professionals who have received the CCS™ Designation in almost every province. 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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