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Course Information

Course Title: *Facilitating Financial Health* #295919

Recommended CPE credit hours for this course

In accordance with the standards of the CFP Board and the IDFA, CPE credits have been granted based on a 50-minute hour.

CFP®	**11**	(Registered with the CFP Board (course ID 233684), sponsor #1008)
CDFA®	**11**	(Registered with the Institute for Divorce Financial Analysts)

Course Description

Facilitating Financial Health is a one-of-a-kind course that bridges the gap between financial planners and mental health practitioners. The authors, two mental health professionals and a CFP®-designated financial planner, pioneered the use of tools that help clients build healthy relationships with money.

This concise yet comprehensive Guide enables financial planning and mental health practitioners to effectively integrate tools from the fields of psychotherapy, life coaching, and financial planning as they help their clients change destructive financial behaviors.

Course content

Facilitating Financial Health by Brad Klontz, Psy.D, Rick Kahler, CFP®, and Ted Klontz, Ph.D.,
292 pages, ISBN 9781941627877 Copyright © 2016 by National Underwriter Company.
Final Exam (online):Fifty-five multiple choice questions.

Subject Codes

CFP Board, IDFA: *General Principles of Financial Planning*
NAPFA: *Communication*

Level of Complexity

Overview (programs that provide a general review of a subject from a broad perspective or dive into basic knowledge on a specific skill or topic. Best suited for CFP® professionals seeking knowledge in an unfamiliar subject area and with entry level experience.)

Instructions for Taking This Course

Instructions for Taking This Course

- **Log in to your secure account at www.bhfe.com. Go to "My Account."**
- **You must complete this course within one year** of purchase (If the course is "Expired," contact us and we will add the latest edition of the course to your account (no charge).
- **To retain the course-PDF after completion (for future reference) and to enable enhanced navigation:** From "My Account," Download and save the course-PDF to your computer. This will enable the search function (Menu: Edit>Find) and bookmarks (icon on left side of document window).
- **Complete the course by** following the learning objectives listed for the course, studying the text, and, if included, studying the review questions at the end of each major section (or at the end of the course).
- **Once you have completed studying the course** and you are confident that the learning objectives have been met, answer the final exam questions (online).

Instructions for Taking the Online Exam

- **Log in to your secure account at www.bhfe.com. Go to "My Account."**
- A passing grade of at least **70%** is required on the exam for this course.
- You will have three attempts to pass the exam (call or email us after three unsuccessful attempts for instructions).
- The exam is not timed, and it does not need to be completed in one session.
- For a printed copy of the exam questions, open the exam and press "Print Exam."
- Once you pass the exam, the results (correct/incorrect answers) and certificate of completion appear in "My Account." A confirmation email is also sent.
- CFP Board and IRS credit hours, if applicable, are reported on Tuesdays and at the end of the month.

Have a question? Call us at 800-588-7039 or email us at contact@bhfe.com.

Learning Objectives

As a result of studying the course-book, you should be able to meet the following learning objectives:

- Address your clients' money-driven problems, from both financial planning and mental health perspectives
- Learn the best techniques and recognize when to call in help from outside your field when dealing with clients' financial issues
- Focus on both interior (emotional and intangible aspects of money) as well as exterior (the tangible "nuts and bolts" of financial planning) financial health topics
- Explore "Money Scripts" – beliefs about money commonly held by clients, financial planners, and therapists that can lead to destructive financial habits
- More effectively work with individuals and couples on difficult financial health topics

About The Authors

Brad Klontz, Psy.D., CFP® (www.yourmentalwealth.com) is a Managing Principal at OCCAM (Occidental Asset Management, LLC), a Registered Investment Advisory firm and partnership opportunity for advisors, and a leading expert in financial psychology and behavioral finance. He is the co-founder of the Financial Psychology Institute™ and an Associate Professor at Creighton University Heider College of Business, which now offers a five-course Executive Certificate in Financial Psychology & Behavioral Finance based on his work with Dr. Ted Klontz. Currently, Brad has partnered with JP Morgan Chase to help create a program that will educate people on how they can protect themselves from fraud. He is a Fellow of the American Psychological Association, a Former President of the Hawaii Psychological Association, and a former spokes- person for H&R Block's financial education program, "Dollars & Sense." Dr. Klontz is a leading researcher, educator, and clinician in financial psychology, and in addition to Facilitating Financial Health, Dr. Klontz has coauthored and/or coedited four other books on financial psychology including Financial Therapy: Theory, Research & Practice; Mind Over Money; Wired for Wealth; and The Financial Wisdom of Ebenezer Scrooge. Dr. Klontz's, work has been featured on numerous media outlets, including ABC's 20/20, NPR, The New York Times, USA Today, and The Wall Street Journal.

Rick Kahler, MS, CFP®, ChFC, CCIM (www.KahlerFinancial.com) is a fee-only financial planner, speaker, educator, and columnist. Rick is renowned as a pioneer in integrating financial planning and psychology. BusinessWeek named him one of the top fifteen most experienced financial planners in the nation. He is a past chairman of the South Dakota Investment Council, managing $6 billion, an adjunct faculty member at Golden Gate University, and a Past-President of the Financial Therapy Association. In addition to Facilitating Financial Health, Rick is a co-author of three other books on financial psychology and financial planning: The Financial Wisdom of Ebenezer Scrooge, Conscious Finance, and Wired For Wealth. His work has been featured in scores of publications, including ABC News, NBC, CNBC, The New York Times, USA Today, The Wall Street Journal, The Washington Post, Fox Business, Reuters, Money, Time, Forbes, and MSN Money.

Ted Klontz, Ph.D., (www.yourmentalwealth.com) is a consultant with Onsite Workshops, a Professor at Creighton University Heider College of Business, and is at-counsel to Flood, Bumstead, McCarthy and McCready a leading entertainment financial management group. Dr. Klontz is co-founder of the Financial Psychology Institute™, and a noted pioneer in blending the fields of psychotherapy and financial planning. He is an international speaker, trainer, work- shop designer and facilitator, and he has an extensive international private consulting practice. Dr. Klontz has been a contributor to and co-author of a number of books, The Financial Wisdom of Ebenezer Scrooge, Wired For Wealth, Mind Over Money, Wired for Wealth, and The Financial Wisdom of Ebenezer Scrooge. His work and research has been cited in numerous periodicals, books, and other media, including ABC News, NBC, CNBC, The New York Times, USA Today, The Wall Street Journal, The Washington Post, Fox Business, Money, Time, Forbes, MSN Money, The Oprah Winfrey Network, and ABC's 20-20.

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