Facilitating Financial Health

Tools for Financial Planners, Coaches, and Therapists
Course Information

Course Title: Facilitating Financial Health #295919

Recommended continuing education credit hours recommended for this course:
In accordance with the standards of the Certified Financial Planner Board of Standards and the National Registry of CPE Sponsors, CPE credits have been granted based on a 50-minute hour.

CFP® 11 (All states) CFP Board Course ID# 233684; CFP Board sponsor number: 1008.

Course Description

With the newly revised 2nd Edition, Facilitating Financial Health remains a one-of-a-kind publication 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.

Subject Codes
CFP Board: General Principles of Financial Planning
NAPFA: Communication

Course Content

Level of Complexity
Intermediate
Instructions for Taking This Course

Complete the course by reading the course-book (paying special attention to the learning objectives listed below) and taking the online exam. In order to receive CFP Board CE credit for this course, you must complete the course by achieving a passing grade of at least 70% on the online exam. Exams may be retaken if not passed on the first attempt (no charge).

Instructions for Taking the Final Exam Online

- Login to your account online at www.bhfe.com.
- Go to “My Account.”
- Select “Take Exam” for this course and follow instructions.

As an alternative, you may complete the exam offline and fax or email your answers using an answer sheet that is provided with the course study guide.

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

This publication is designed to provide accurate and authoritative information in regard to the subject matter covered. It is sold with the understanding that the publisher is not engaged in rendering legal, accounting or other professional service. If legal advice or other expert assistance is required, the services of a competent professional should be sought. – From a Declaration of Principles jointly adopted by a Committee of the American Bar Association and a Committee of Publishers and Associations.

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About the Authors

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