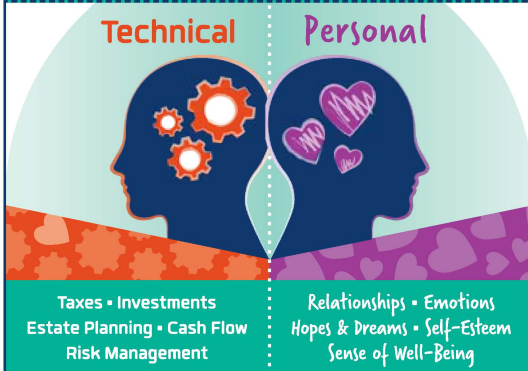


# The Fascinating Journey of Financial Transitionists® and their Clients

## TRANSITION EXPERTISE MATTERS

We train and certify the **experts**.  
Our process is **empowering**. Here's why...

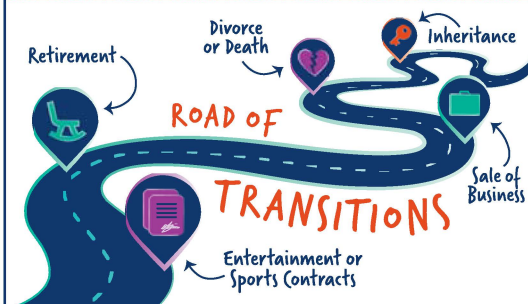
## THERE ARE TWO SIDES TO MONEY



Both sides are equally **important** and **complex**...but it's the **personal side** that drives decision-making.

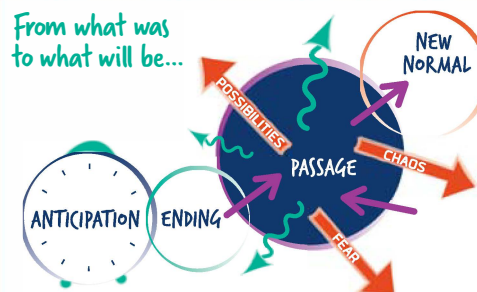
**DECISIONS**

## TRANSITIONS ARE IMPORTANT LIFE PIVOT POINTS



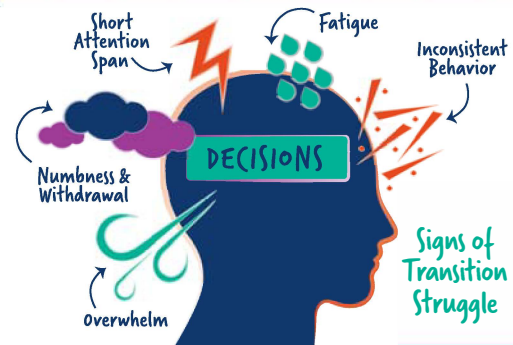
Transitions begin with an **end** and typically take **longer** than expected. They are often a time of **confusion**... and always a time of **opportunity**.

## TRANSITIONS HAVE FOUR STAGES



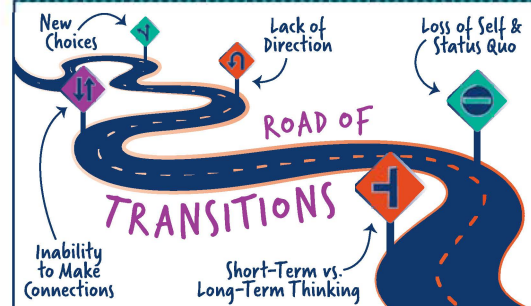
"When life changes money changes, and when money changes life changes."  
—Susan Bradley, CFP®, CeFT™ Founder of the Sudden Money® Institute

## TRANSITIONS AFFECT HOW WE THINK, FEEL, AND ACT



The effects of **transition struggle** can **complicate** decision-making.

## STRUGGLES OF TRANSITION



## APPROACHES TO TRANSITION

### Traditional



Traditional financial planning focuses on the technical side, making *some* accommodation for the personal experience.

### CeFT™ Financial Transitionist®



The CeFT's™ work is adaptive. They focus squarely on the personal side & integrate it fully into the technical side.

## FINANCIAL TRANSITIONISTS®..

Provide their clients with **safe passage**.



...Are trained to meet the challenges of all four transition stages.  
...Have the tools & expertise to keep clients safe & productive.  
...Act as thinking partners to help clients explore possibilities.