



Continuing
Education
Programming

Wealth and Wellness 2.0 – The Wealth Advisor as a Coach

CFP Board approved for 1 hour of CE credit towards the CFP® certification.

Investments and Wealth Institute™ (formerly IMCA®) approved for 1 hour of CE credit towards the CIMA® and CPWA® certifications.

Program Description:

The Wealth and Wellness 2.0 program is designed for financial services professionals and their teams seeking to enhance their capabilities as coaches skilled in delivering financial advice in keeping with a client's whole life goals. This in-person, facilitator-led workshop teaches participants how to engage more completely with their clients by understanding the 8 dimensions of wellness⁽¹⁾ and how those dimensions can motivate a client's actions.

This program covers fundamental concepts in working with high net worth individuals and recent retirees, including, the 8 dimensions of wellness, motivational interviewing, appreciative inquiry, visioning, SMART goals, and managing readiness to change.

To complete the Wealth and Wellness 2.0 program, professionals must demonstrate active participation in the workshop and successfully complete two quizzes given during the workshop.

Learning Objectives:

1. Understand the 8 dimensions of wellness and how those dimensions can shape a client's actions.
2. Gain a basic understanding of motivational interviewing and appreciative inquiry as tools to more effectively communicate with clients.
3. Gain skills in change management, visioning and creation of SMART goals to help coach clients in their financial strategies.

Detailed Content Outline:

Module 1: 8 Dimensions of Wellness and How They Can Shape a Client's Actions

Module 2: 18 Things Mentally Strong People Do

Module 3: Motivational Interviewing, Appreciative Inquiry and Listening Exercises to Build Coaching Skills

Module 4: Improving Readiness to Change

Module 5: Creating the Plan – Visions, Goals and Timelines

Module 6: Staying Positive – Resiliency for Wealth Advisors and Clients

Program is presented by TrueSquid, LLC and Joselyn Hall. Joselyn Hall earned her Masters in International Business from the University of South Carolina and is a Wellcoaches® Certified Personal Coach and a Wellcoaches® Certified Health and Wellness Coach. After over 20 years in corporate roles for Fortune 500 companies, she started her own company to help others live their best lives. She works with individuals, wealth professionals, and recent retirees through one on one coaching, team building workshops which can provide continuing education credits, and weekly individual coaching intensives designed to provide lasting results. For more information visit www.truesquid.site.

Sources: Wellcoaches®, American College of Sports Medicine, Duke Integrative Medicine Wheel of Health, University of North Dakota 7 Dimensions of Wellness Personal Wellness Assessment, SparkPeople, Inc. (largest online diet and healthy living community with over 12 million registered members.)