Financial Therapy Association 2nd Annual Conference

September 11-13, 2011

The Classic Center www.classiccenter.com in Athens, Georgia

Hosted by the College of Family and Consumer Sciences, University of Georgia

Register Now at http://www.financialtherapyassociation.org

PRELIMINARY PROGRAM

Sunday September 11th

6:00 - 9:00 PM	**Welcome Reception at Hotel Indigo www.athensdowntownhotel.com**

Linda Kirk Fox, Dean

Monday September 12th **All events held at The Classic Center**

7:30 - 8:45 AM	**Continental Breakfast**

9:00 - 10:00 AM	**Opening General Session**

Olivia Mellan, The Evolution of Money Harmony Work

Psychotherapist and coach Olivia Mellan will discuss how she has used "money harmony work" since 1982 to help clients forge a healthier and more balanced relationship with their money life. Mellan will share her understanding of childhood messages and vows, money myths, money personality types, money dialogues, couples' polarization patterns, and gender differences. She will describe how to create stronger and more lasting connections with clients and describe how practitioners can help generations of families create better communication around money and values.

10:00 - 10:30 AM	**Break / Poster Session**

Posters:

Observational Coding of Anxiety in a Financial Counseling Context

Kevin J. Zimmerman, PhD Candidate; Janet N. Melby, PhD; & Clinton G. Gudmunson, PhD, Iowa State University

The Use of Neurocardiology Techniques in Financial Therapy

Lyndsey R. Hjelmstad, PhD Student; Lee N. Johnson, PhD; & David W. Wright, PhD, University of Georgia

Factors Influencing Financial Satisfaction

Mary M. Bell, MS, CFP®, AFC®; John E. Grable, PhD, CFP®; & Sonya L. Britt, PhD, AFC®, Kansas State University

Predictors of Mortgage Foreclosure Among Rural, Low-income Households: Using this Information to Create Best Practices for Pre- and Post-purchase Housing Counseling

Diane N. Loeffler, PhD, MSW, University of Kentucky; & Martie Gillen, PhD, MBA, University of Florida

How do You Get Financial Satisfaction?

Chris Wyczalkowski, CFP®; Donna Danns, PhD Student; & John Allen, MS Student, University of Georgia

Personal Financial Wellness and Relationship Communication Behaviors: Impacts on Relationship Well-Being

Melissa J. Wilmarth, PhD Student; Allen W. Barton, PhD Candidate; Robert B. Nielsen, PhD; & Ted G. Futris, PhD, University of Georgia

The Effect of Financial Goal Setting on College Seniors

Robin Henager, MBA, PhD Student; & Brenda J. Cude, PhD, University of Georgia

Applying Levels of Family Needs and Interventions Approaches to Financial Counseling: An Integrative Model in Hong Kong Context

Anne M. C. Cheng, R.S.W., MSocSc(SW) student, University of Hong Kong

10:30 AM - 12:00 PM Break Out: Practitioner & Research Presentation (Concurrent Sessions)

Session A:

Working with Communication Issues in Financial Psychology

Mary Gresham, PhD, Atlanta Financial Psychology

Money as Self-Regulation: Theory and Practice

Maggie N. Baker, PhD, Private Practice and Adjunct Faculty, Widener University School of Graduate Clinical Psychology; & Howard S. Baker, MD, University of Pennsylvania School of Medicine

Session B:

Women & Wealth: Counseling Techniques for Empowering Women

Kathleen Burns Kingsbury, LMHC, CPCC, KBK Wealth Connection, Bentley University McCallum Graduate School of Business

Stopping Overshopping: Tools, Skills, and Strategies that Work

April Lane Benson, PhD

Recurring Themes in Ten Years of Financial Therapy Practice

Amanda Mills, PhD

Session C:

A Demonstration of Financial Therapy

Rick Kahler, MS, CFP®, Kahler Financial Group; & Dave Jetson, MS, Jetson Counseling

12:00 - 1:15 PM Lunch

Preliminary Considerations for the Development of the Financial Therapy Association

Jerry Gale, PhD; Joseph Goetz, PhD, University of Georgia; & Sonya L. Britt, PhD, AFC®, Kansas State University

1:30 - 2:45 PM Book Signings

3:00 - 4:30 PM **Break Out: Practitioner & Research Presentations (Concurrent Sessions)**

Session A:

Financial Therapy in Recessionary Times: Moving Beyond Trauma and Despair

William "Marty" Martin, PsyD, MPH, MA, MS, Aequus Wealth Management

TOGETHER–A Couples' Program for Managing Financial and Marital Strain

Celia R. Hayhoe, PhD; & Mariana Falconier, PhD, MFT, Virginia Tech

What's the Plan? An Examination of Families with Special Needs Children

Mitzi Lauderdale, JD; & Sandra J. Huston, PhD, Texas Tech University

Session B:

The Development of a Practicum Course in Financial Therapy

Joseph Goetz, PhD; Jerry Gale, PhD; Martin Seay, PhD Candidate; & Chris Wyczalkowski, CFP®, University of Georgia

Exploring the Issue of Timing in Relational Financial Therapy

Megan McCoy, MA, PhD student; Lyndsey Hjelmstad, PhD Student, University of Georgia

Does Mental Health Really Influence Financial Behavior?

Ronald A. Sages, MBA, CTFA, CFP®; Julie A. Cumbie, MBA; & Sonya L. Britt, PhD, AFC®, Kansas State University

4:30 - 5:00 PM **Break / Poster Session**

5:00 - 6:30 PM **Researcher & Practitioner Roundtables**

Assessment Strategies for Financial Coaching: Examples and Field Studies

J. Michael Collins, PhD; & Collin O'Rourke, University of Wisconsin-Madison

Begin at the Beginning: An Initial Assessment of Client Healthy Financial Behavior and Money Temperament

C. LaFaye Hargrove, PhD, Hargrove Leadership Services; Edward P. McLyman, MS, MA; & Richard L. Virgilio, SPHR, MSBA, Apexx Behavioral Solutions Group

How do we Engage the Mental Health Fields More Fully in our Mission of Improved Financial Health?

Joe Lowrance, PsyD, Lowrance Psychology

Mechanisms of Successful Collaboration Between Financial Planners and Marriage and Family Therapists

Lyndsey R. Hjelmstad, PhD Student; J. Stephen Gunter II, MS; Megan A. McCoy, MS; & Christopher K. Wyczalkowski, CFP®, University of Georgia

What is Financial Therapy, Really?

Rick Kahler, MS, CFP®, Kahler Financial Group

6:30 PM **Dinner on Your Own - Downtown Athens**

Tuesday September 13th

7:30 - 8:45 AM	**Continental Breakfast**

9:00 - 10:00 AM	**Break Out: Practitioner & Research Presentations (Concurrent Sessions)**

Session A:

8 Mindful Money Motivations that Drive Client Money Lives Crazy (& How to Help)

Susan Zimmerman, LMFT, CCTP, ChFC; & Steven Zimmerman, CFP®, ChFC, CLU, Mindful Planning

Understanding Financial Mental Health: Exploring Predictors of Financial Anxiety

Kristy L. Archuleta, PhD, LMFT; Scott M. Spann, MA, CFP®; & Anita K. Dale, MS, Kansas State University

Session B:

Teaching Financial Social Work at the Undergraduate and Graduate Levels: Lessons from the Classroom and Beyond

Martie Gillen, PhD, MBA; University of Florida; Reeta Wolfsohn, MSW, Center for Financial Social Work, Inc.; & Diane N. Loeffler, PhD, MSW, University of Kentucky

What We Know, How We Feel, and What We Do: Predictors of Financial Satisfaction

Ann Sanders Woodyard, PhD, CFP®, University of Alabama

Session C:

Coaching and Training a Group of Australian Financial Planners for Enhanced Emotional Intelligence: A Longitudinal Intervention Study

Helen M. Parker, MBA, PhD Candidate; & Michael Cavanagh, Deputy Director & Lecturer, University of Sydney, Australia

10:00 - 10:30 AM	**Break / Poster Session**

10:30 AM - 12:00 PM	**Break Out: Practitioner & Research Sessions (Concurrent Sessions)**

Session A:

Developing a Solution-Focused Approach to Financial Well-Being

Mary M. Bell, MS, CFP®, AFC®; Kristy L. Archuleta, PhD, LMFT, Kansas State University; Megan R. Ford, MS, University of Georgia; Jurdene A. Ingram; Laura Irwin; John E. Grable, PhD, CFP®; & Jeremy Boyle, LMFT, PhD Candidate, Kansas State University

Speaking the Language of the Unconscious Mind

Ted Klontz, PhD, Klontz Consulting Group

What is Theory? Moving Financial Therapy Forward through Theory

Kristy L. Archuleta, PhD, LMFT; Sonya Britt, PhD, AFC®; & R. Roudi Nazarinia, PhD, Kansas State University

Session B:

The ASPIRE Clinic: An Integrative Model for Providing Financial Therapy

Lee N. Johnson, PhD; Joseph Goetz, PhD; Jerry Gale, PhD; Megan Lee, PhD; Barbara Grossman, PhD; Alex Scherr, JD; & Megan Ford, MS, University of Georgia

Financial Coaching Program Development: Integrating Lessons from the Field and Findings from Program Evaluations

Saundra Davis, MSFP, Sage Financial Solutions; J. Michael Collins, PhD; & Collin O'Rourke, University of Wisconsin-Madison

A Financial Issue, a Relationship Issue, or Both? Examining the Predictors of Marital Financial Conflict

Jeffrey Dew, PhD; & Robert Stewart, Utah State University

12:00 - 1:15 PM	**Lunch & Awards Ceremony**

1:30 - 2:30 PM	**Open Board Meeting**

**Attendees are encouraged to become members of FTA to be eligible for the discounted registration fee.*

**This is a preliminary program; there will be changes to the program. A revised program will be provided at the time of checking into the conference and updates can be viewed on the FTA website: www.financialtherapyassociation.org*

**Applications for CEU eligibility in various fields (MFT, Psychology, Social Work, and Financial Planning & Counseling) are currently under consideration.*

Register Now at http://www.financialtherapyassociation.org/Attendee_Registration.html

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The University of Georgia

College of Family and Consumer Sciences

ASPIRE Clinic, www.aspireclinic.org

Family Financial Planning Program
Department of Housing and Consumer Economics

Certificate Program in Marriage and Family Therapy
Marriage and Family Therapy Doctoral Program
Department of Child and Family Development