Contact Information

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Professional Services	Money Coaching Training for Certified Money Coaches Continuing Education for ICF Financial Education and Retirement Transition workshops (online and in person)
Practice Approach	Money Coaching is an intermediate step between self-help and clinical financial therapy. The initial four-step core process helps the client to identify and understand the underlying beliefs, behaviors and patterns that are not serving them well. Ongoing coaching helps to shift the beliefs, change the behaviors, and break the patterns they identify as most challenging. Those which are not responding well to this therapeutically-informed coaching modality are referred to others for additional work.
Client Focus	Individuals, couples, and families
Typical Client Profile	Age: 16+ (unless full family is involved) Gender: Any Income: Any Net Worth: Any
Licenses/Certifications/ Designations	Juris Doctor Certified Money Coach (CMC®) CERTIFIED FINANCIAL PLANNER (CFP®) certificant Certified Retirement Planning Counselor (CRPC®) Chartered Retirement Counselor (CRC®)
Education	B.B.A., 1974, The University of Miami (FL), Accounting with finance minor J.D., 1981, Case Western Reserve University, Emphasis in tax and estate planning
Fee Structure	Hourly Rate or Per-Project Fee
Years in Practice	In financial services from 1981 to 2006, money coaching since 2006.
Professional Association Affiliations	Financial Therapy Association Financial Planning Association Association for Financial Counseling and Planning Education
Research Interests	I would like to collaborate on a research project in youth and mirroring of patterns.

Personal Statement

Knowing that I'm working at my life's purpose, I provide services which help people to better understand themselves and others important in their life when it comes to their money beliefs, patterns, and structure, through my private money coaching practice. I also train and support others in their mission to do the same through my work with The Money Coaching Institute, the largest training organization in the field servicing behavioral science practitioners, financial service professionals, and coaching professionals.