Presentations by Dr. Kristy L. Archuleta

Financial Professional-focused Presentations

*All presentations can be formatted to engage with a variety of audiences.

1. **Tapping Clients’ Strengths to Create Behavior Change**: *CFP & AFC CEU Eligible*

   Financial therapy is the integration of emotion, thoughts, behavior, relationships and its effect on financial and overall well-being. Financial therapists tap into one or more of these areas to help clients make changes to improve individual, couple, and family financial and overall well-being. This presentation introduces basic concepts of financial therapy, including what it is, clients’ money beliefs, 2-3 tools that professionals can implement with their clients, and how to collaborate with a financial therapist.

2. **Communication Skills for Financial Planners**: *CFP & AFC CEU Eligible*

   The basis for client success is a strong working alliance between advisor and client. Effective communication skills are essential to building a solid relationship with clients. In this presentation, we will review communication basics, uncover the essentials of listening and explore the use of curiosity to build better client relationships.

3. **Creating Financial Partnerships with Family Clients**: *CFP & AFC CEU Eligible*

   Effectively communicating and building trust with clients is a significant aspect of engaging and retaining clients to fulfill the financial planning process. Couple or family relationships (e.g., married couples, non-married couples, siblings, parent-child, etc.) present dynamics that can complicate the financial planning process. This presentation addresses how to (a.) successfully engage and connect with relational clients, (b.) build trust when working with relational clients, (c.) diffuse conflict with relational clients, and (d.) collaborate with other relational experts to help your clients reach their financial goals.

4. **Financial Anxiety & Stress:** *CFP & AFC CEU Eligible*

   Stress about money is one of the top stressors among Americans. Anxiety and stress can get in the way of clients' ability to follow through or implement recommendations. This presentation explores the differences between anxiety and stress, effective tools to help clients manage financial anxiety and stress, and how to make an appropriate referral.

5. **A New Way of Thinking: Solution-Focused Financial Therapy**: *CFP & AFC CEU Eligible* (minimum 2 hours for introduction; more advanced training is 4-6 hours)

   Do you ever feel stuck and do not know what to do next? Do clients seem like they don't implement recommendations or do things that would help them achieve their financial goals? Solution Focused Financial Therapy borrows from the evidence-based approach of Solution-Focused Therapy and combines it with personal finance to help clients implement changes to meet their goals. In this intensive training, Dr. Archuleta utilizes evidence and experience to take a deep dive into how to utilize Solution-Focused Therapy tools and techniques to access clients' strengths to help them create meaningful changes in their lives and achieve financial and overall well-being.

6. **Overwhelmed and Burned Out: Working with Clients Even When You Don't Feel Like It**: *CFP & AFC CEU Eligible*

   Feeling overwhelmed, stressed, and burned out? Is connecting with clients harder? You are not alone. Stress and burnout are real concerns that financial advisors face as professionals who help others. The stressors we have endured over the past three years have created or, in some cases, intensified these issues. Striking a balance may seem impossible. This presentation will explore stress and burnout and provide tools for financial planners to manage burnout so you can keep thriving in your work with clients—even when you don't feel like it.

7. **Sometimes I Feel like a Therapist: Strategies for Helping Clients through Difficult Issues**: *CFP & AFC CEU Eligible*

   Have you ever felt like you needed the skills of a therapist but were not trained as one? An essential aspect of being a financial professional is working with the humanness of our clients. Dealing with the human side of people can be difficult and messy and may leave you feeling like you are a therapist when you do not have the qualifications, education, or background to do so. Dr. Archuleta will utilize her training and experience as a Licensed Marriage and Family Therapist and a Certified Financial Therapist-I™ to address how to handle difficult situations and mental health crises when you are not a therapist. In this presentation, she will help financial professionals know: (a) how to respond to clients who are experiencing distress or are in a crisis, (b) clarify your scope of practice and when and how to get help, (c) identify collaboration models with other helping professions, and (d) discover strategies for self-care as a help provider.

8. **Dynamics of a Duo: Navigating Couple Relationships in Your Financial Planning Practice**: *CFP & AFC CEU pending*

   Working with intimate couple relationships can pose challenges to financial planners due to financial conflicts, opposing money beliefs and values, and complexities of managing couple relationship dynamics. Dr. Kristy Archuleta, a leading researcher and expert on couples and money, will share how to build a strong working alliance with couple clients and techniques to help clients work through financial issues and differing views of money that get in the way of meeting their goals. This session will help you create positive experiences and successful outcomes for your clients in intimate partner relationships.

Financial Behavior KEYNOTE GROUP

Client & Employee-focused Presentations

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1. **It Takes Two to Tango: Improve Your Finances and Relationship with Your Partner**

   Do you and your partner fight about money? Does your conflict get in the way of achieving your financial and life goals? Join Dr. Kristy Archuleta, a leading expert and researcher on couples and money, to learn why money is a challenge for couples in intimate relationships and how you and your partner can work together to improve your relationship and your financial well-being.

2. **Managing Financial Stress & Anxiety**

   Most people face some sort of stress or anxiety in their lives. When people face difficult financial situations, including bear markets, major life transitions, or crises, for example, our natural response is to react to the stressor both physiologically and emotionally. Distinguishing between stress and anxiety as it relates to money and how to manage it are important factors in the pathway to financial success. In this session, we will identify financial anxiety and stress, help you assess your own financial anxiety, and learn tools to manage financial anxiety and stress to lead to financial satisfaction.