



Presentations by Dr. Michael G. Thomas, Jr.

Financial Professional-focused Presentations

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

1. **Financial Empathy: Understanding the Story Beneath the Numbers:** *CFP & AFC CEU Eligible*

Dr. Michael Thomas (Ph.D., AFC) unpacks his TED talk on financial empathy in a way that provides a clear understanding of what empathy is, the need for financial empathy, and how to operationalize empathy to improve client relationships and outcomes. Empathy is not a fad or trend that will soon pass. It is the deepest expression of seeing the humanity in the people you serve so that you can create lasting solutions that fit the context of their lives.

2. **Diversity and Inclusion: Empathy or Sympathy?:** *CFP & AFC CEU Eligible*

Dr. Michael Thomas uses the platform of empathy and compassion to illustrate how diversity and inclusion efforts are most effective from a place of empathy - not sympathy. During this talk, Dr. Thomas unpacks the differences between empathy and sympathy, the effects on diversity and inclusion based on these lenses, and how to utilize empathy in your diversity and inclusion efforts effectively. At the end of this session, you will clearly understand why an empathetic approach is better than a sympathetic approach and a model for employing empathy in your workplace.



3. **Maybe It's the System:** *CFP & AFC CEU pending*

Social capital, the relationships people have with formal and informal networks, plays a significant role in how people navigate their lives from day to day. Often overlooked, within these social constructs exist invisible systems that set a precedent for how people behave, feel, and interact with one another. These systems, if not explored, can be the very things that are preventing your clients from achieving their financial goals. In this presentation, Dr. Michael Thomas will unpack systems and social capital theories to help you address your clients' systems to encourage sustainable behavioral change.

4. **Understanding the Impact of Data Visualization on Client Behavior:** *CFP & AFC CEU Eligible*

We live in a world where your clients are being inundated with information. Major alerts, breaking news, and micro distractions are ubiquitous in our everyday lives. None of which is random. Your clients navigate systems carefully designed to nudge and encourage their behavior for attention, time, and money. Have you taken the time to consider the impact that visual cues have on behavior and how you can create information that motivates optimal client behavior? In this session, we will explore data visualization's motivation on human behavior and how you can use it for good.



Client & Employee-focused Presentations

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1. Financial Socialization

Financial socialization can happen directly, indirectly, or a combination of both. Our words and actions set the bedrock for our children to know and engage with money. In this presentation, Michael will discuss being more intentional about the financial messages we share with our children.

2. Self-Compassion and Financial Well-being

Gratitude alone is not enough. It is possible for an individual to have gratitude for what they have but not feel deserving of it. The root causes for these feelings can be many; however, it is difficult to move beyond them without also engaging in self-compassion. In this presentation, Michael will unpack compassion and how it can be used for financial well-being.

3. Employing Financial Empathy within a Relationship

Financial empathy, anyone? We can all agree that communication is the bedrock of any relationship. Whether or not we are doing it effectively is an entirely different matter - especially when it comes to money. In this presentation, Michael will unpack financial empathy and how to employ it when discussing money.

4. Social Capital and Collegiate Success

The benefits that come from collegiate success are dependent upon one's ability to matriculate through to graduation. Academic success is not the only component of this equation. Establishing social capital is equally important. In this presentation, Dr. Thomas will discuss social capital's impact on collegiate success.



5. Access Does Not Equal Success: Investing in the 21st Century

With the advent of applications of apps like Acorn, Cashapp, Robinhood, Coinbase, and others, individual investing is more accessible than it has ever been before. Greater access, however, does not mean greater individual investor success. In this presentation, Dr. Thomas will discuss the impact of data visualization on individuals and gamification on individual investment behavior.