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PFP Section

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aicpa.org/PFP

Stages of Life Transition

Purpose, Method, Outcome

Client Protocol from FTI/SMI



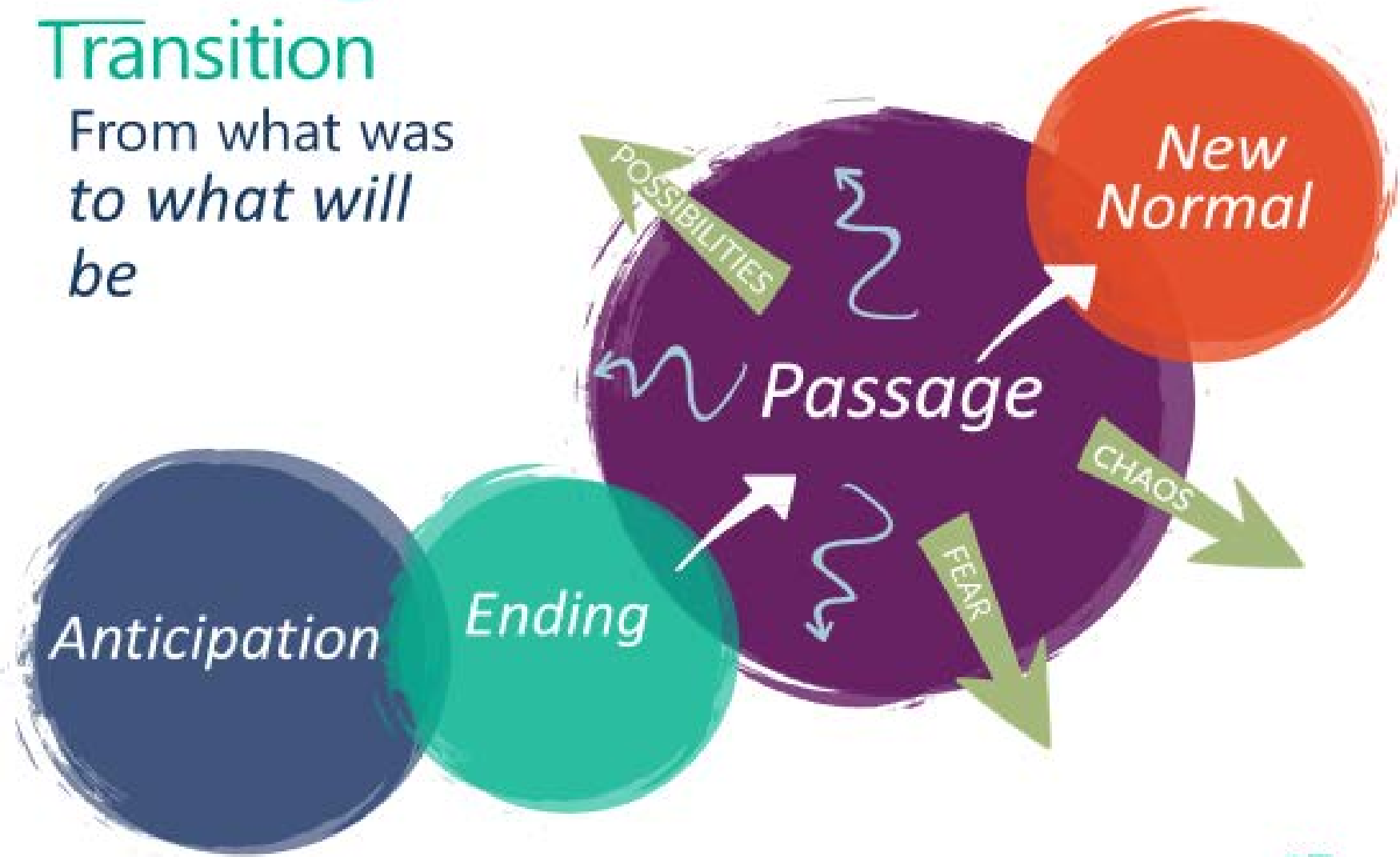
AICPA Podcast

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Presented by
Susan K Bradley, CFP[®], CeFT[®], Founder
Financial Transitionist Institute,
a Division of the Sudden Money Institute

Four Stages of Transition

From what was
to what will be



“When money changes life changes, and when life changes money changes.”

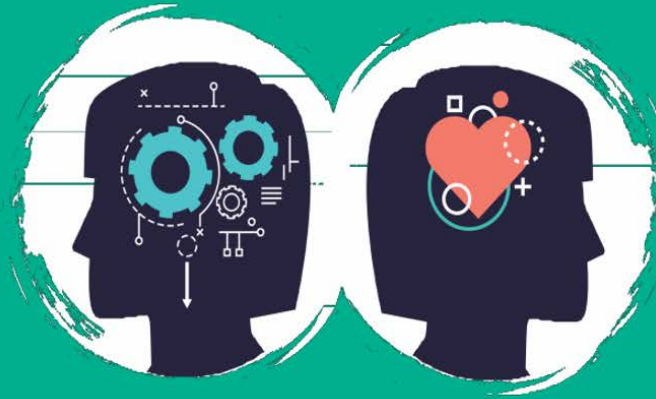
®

Susan Bradley, CFP®, CeFT®, founder of the Sudden Money Institute

Two sides of money

Technical

Taxes
Investments
Estate Planning
Cash Flow
Risk Management



Personal

Relationships
Emotions
Hopes & Dreams
Self-Esteem
Sense of Well-Being

Both sides are equally *important* and *complex*...but it is the *personal side* that drives decision-making.

FLOW

Identity Intact
Clarity
Hopeful/Resilient
Realistic About Possibilities
Refreshed/Energized

Open/Collaborative
Focused/Attentive
Consistent Behavior
Composed

STRUGGLE

Identity Compromised
Confusion/Overwhelm
Hopeless
Invincible
Mental & Physical Fatigue

Numb/Withdrawn/Frozen
Narrow or Fractured Focus
Inconsistent Behavior
Combative



Thank You

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Training and Tools

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The unified voice of AICPA and CIMA

Thank you



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CPA

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