Financial Therapy Association

Virtual 2020 Conference

# Awaken Your Story. Awaken Your Potential.

October 8th and 9th

***Please Note: All sessions are EST***

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## Thursday, October 8, 2020

## ** Please Note: All sessions times are EST**

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| 11:00 – 12:00 pm | **Opening Session: Financial Therapy – Past, Present, and Future**<br>**Bruce Ross, PhD & Sarah Swantner, MS, NCC, CFP** |
| 12:10 – 1:00 pm | **First Breakout Session:**<br>**Session 1:** Advanced Clinical Model: The Four Love Languages and Restoring Your Clients Financial Life<br>**Ed Coambs**<br>**Session 2:** Using Emotion in Financial Therapy: Application of Emotionally-Focused Therapy Theory to Financial Therapy<br>**Nathan Astle, Kirsten Cadden, Gayle Rodriguez & Megan McCoy, PhD**<br>**Session 3:** The Rider & The Elephant: A visual Metaphor to help clients tap into their best financial decision-making mode<br>**Cherie Stueve, PhD Candidate, MBA CPA(Inactive) AFC® & David Allen Ammerman, PhD** |
| 1:00 – 1:20 pm | **Lunch Break** |
| 1:20 – 2:50 pm | **Lunch Keynote Speaker:** Helping Financial Service Professionals Develop Financial Empathy through Financial Therapy<br>**Michael Thomas, PhD** |
| 3:00 – 3:50 pm | **Second Breakout Session:** |

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| | **Session 1:** Tools from The Trenches That Will Awaken Your Client's Money Story<br>**Richard S Kahler, MS, CFP®, CFT-I™, CeFT®**<br>**Session 2:** How Being You Impacts Your Work: A Live Demonstration of Person of the Therapist Genogram Exploration<br>**Megan McCoy, PhD, Ingrid Ponciano, Kristy Archuleta, PhD** |
| 4:00 – 4:50 pm | **Third Breakout Session:**<br>**Session 1:** Money Mistresses and Financial Betrayal: Exploring Monetized Rage and Financial Control in Relationship<br>**Debra L Kaplan**<br>**Session 2:** Using Scaffolding Learning Theory as a Framework to Enhance Financial Education with Financial Planning Clients<br>**Elizabeth Sterbenz, Megan McCoy, Raylee Melton, Dylan L. Ross, & Jed C. Smith**<br>**Session 3:** The Cost of Cancer: The Association of Financial and Cancer-Related Stress on Maladaptive Coping Styles in Families with a Cancer Diagnosis<br>**Emily Johnson, M.S. & Bruce Ross, PhD** |
| 5:00- 6:00 pm | **Poster Session:** Lightning Round Poster Presentations<br><br>Application of trans-theoretical model of change with Financial Social Work Model in financial counselling<br>**Ruby Yip Yuk Ying**<br><br>The Intersection of Money and Milkshakes<br>**Wendy Wright, LMFT, CEDS, CFRC, CIEC**<br><br>Effectiveness of Financial Therapy as an Intervention on Financial and Behavioral Health, a Modified Systematic Review<br>**Jeffrey Anvari-Clark, MA, MSW**<br><br>The Hidden Psychological Effects of Money on Black Women<br>**Anita R Johnson**<br><br>Chopping Budget: Financial Tips for Future Growth<br>**Dion Lucas & Elizabeth Richardson** |
| 6:10 – 7:00 pm | Happy Hour & Social: Poster Round Tables- Chance to speak with Poster Presenters and Attendees |

## Friday, October 9, 2020

## ** Please Note: All sessions times are EST**

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| 9:30 – 10:30 am | Conference FTA Board Meeting |
| 11:00 – 12:30 pm | **Morning Keynote Speaker:** Awakening the Money Story for People with Disabilities<br>**Micahel Rousch, MA, AFC & Nanette Goodman** |
| 12:40 – 1:30 pm | **First Breakout Session:**<br>**Session 1:** Spending and Saving Congruency: A Key to Understanding Marital and Financial Satisfaction<br>**Jamie Lynn Byram, PhD & John E. Grable, PhD**<br>**Session 2:** The Evolution of a Story: Updating Narrative Financial Therapy to new CFP Board Steps with Experiential Practice Opportunities<br>**Megan McCoy, Bruce Ross, & Dylan Ross**<br>**Session 3:** The Factors Related to the Use and Trust of Investment Advice: The Impact of Money Scripts<br>**Travis Sholin & HanNa Lim** |
| 1:30 – 2:00 pm | **Lunch Break** |
| 2:00 – 3:00 pm | **Lunch Keynote Speaker:** The Psychology of Money<br>**Morgan Housel** |
| 3:10 – 4:00 pm | **Second Breakout Session:**<br>**Session 1:** This Grief Isn't Brief: How Financial Therapists Can Recognize, Cope, & Help with COVID-19 Grief<br>**Susan Zimmerman, ChFC, LMFT, CMC-1**<br>**Session 2:** Neutral is Not an Option: The diversity of silence and neutrality<br>**George M. Blount, DBA**<br>**Session 3:** Measuring Perceived Partner Financial Behavior in Relationships: The Development of a Spender-Saver Perception Scale<br>**Michelle Kruger & John E. Grable, PhD** |
| 4:10 – 5:00 pm | **Third Breakout Session:**<br>**Session 1:** Helping Clients Become Happier, Better Versions of Themselves<br>**Derek Hagen**<br>**Session 2:** Financially True Boundaries<br>**Dave Jetson, MS, LPC-MH, LCPC** |
| 5:10 – 6:00 pm | **Concluding Remarks with Happy Hour & Social** |