# Financial Therapist Network Listing

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| **Professional Services** | Keynote speaker, workshop facilitator, graduate school (CFP program) professor and author. Services include speaking, training, and consultant on women and wealth and couples and money. Expert source for media interviews and contributing columnist for a variety of trade publications and consumer magazines. |
| **Practice Approach** | My background is in cognitive behavioral psychology. I use adult learning theory in all my presentations and believe that hands on learning, followed by small action steps, is the key to real habit change. These principals are part of my coaching, training and consultant practices. |
| **Client Focus** | Train Advisors, Bankers and Related Financial Services Professionals how to be more female- and couple-friendly |
| **Typical Client Profile** | Age: 30-65 years of age<br>Gender: Male and Female Advisors<br>Income: Various<br>Net Worth: Various |
| **Licenses/Certifications/ Designations** | Masters in Counseling Psychology (MA)<br>Certified Professional Co-active Coach (CPCC) |
| **Education** | Master in Counseling Psychology from Lesley University<br>Bachelors in Finance from Providence College<br>Coach Training Institute |
| **Fee Structure** | Call or email to inquire |
| **Years in Practice** | 20 years |
| **Professional Association Affiliations** | Financial Therapy Association, National Speakers Association, American Associations of University Women, Purposeful Planning, Ellevate |
| **Do you work *at a distance* such as with Skype?** | Trainings via webinars and advisor business coaching via Skype offered |
| **Research Interests** | Women and Wealth, Couples and Money and the intersection between a Woman's Body Confidence and her Financial Confidence. |

**Contact Information**

Kathleen Burns Kingsbury
KBK Wealth Connection
PO Box 1006
Waitsfield, VT 05673

Phone: 617.803.6046
Email: kbk@kbkwealthconnection.com
Website: http://www.kbkwealthconnection.com
YouTube:
https://www.youtube.com/user/KBKWealthConnection

**Personal Statement**

A wealth psychology expert, founder of KBK Wealth Connection, and the author of four books including *How to Give Financial Advice to Women* and *How to Give Financial Advice to Couples,* both published by McGraw-Hill.

Kathleen has served on the CNBC Digital Financial Advisor Council and is a sought-after keynote speaker at industry conferences. As an expert on financial psychology, Kathleen is quoted frequently in trade publications including *Wall Street Journal* and *Reuter's,* and her articles have appeared in *American Banker, CNBC, Investment News,* and *Investment and Wealth Monitor.*

Kathleen is a faculty member of the Certified Private Wealth Advisor (CPWA) program offered by the Investment Management Consultants Association (IMCA) and is an adjunct lecturer at the McCallum Graduate School of Business at Bentley University, where she teaches Psychology in Financial Planning.