

**Susan Zimmerman, MA, LMFT, ChFC, CLU**  
**14530 Pennock Avenue, Apple Valley, MN 55124**  
**Phone: 952-432-4666, Susan@mindfulplanning.com**

## **Summary**

Susan's Bachelor's degree in social science is from the University of Minnesota. She is a Licensed Marriage and Family Therapist with a Master of Arts degree in counseling from the Alfred Adler Graduate School of Minnesota (1997). Her financial credentials, Chartered Financial Consultant and Chartered Life Underwriter are from the American College in Bryn Mawr, Pennsylvania. Susan is in her 28<sup>st</sup> year as founding partner of Mindful Asset Planning, a financial counseling and planning firm. She is the author of books and tapes on money psychology, including a book published in 2014 for financial and social service practitioners called *Mindful Money for Wealth & Well-Being: Help Clients Strike a Balance in Financial Planning*. Her book, *Rays of Hope in Times of Loss: Courage and Comfort for Grieving Hearts*, helps people navigate through tough transitions. Susan is a popular conference speaker and member of the National Speakers Association and has been on television, radio, and featured extensively in print media including *First for Women*, *LA Times*, *Wall Street Journal*, *Investment News*, *Advisor Today*, *Chicago Tribune*, and the *St. Paul Pioneer Press*. Susan has completed her business succession plan in financial planning and now applies her experience to organizations that help people through education, counseling, planning, and coaching.

## **Professional Experience**

- 10/87-Present: Mindful Asset Planning & Programs; Counselor/Consultant/Speaker/Author  
Co-founded financial planning firm and established independent fiduciary registered investment advisory firm that provides financial planning, specializing in self-employed, couples, and blended families. Currently trains advisor teams and provides therapeutic coaching for clients. Educated thousands as public speaker on financial psychology to universities, corporations, non-profits, associations, consumers, and other groups.
- 10/84-10/1987: Cardinal Health Systems; National Sales Manager  
Project Manager promoted to National Sales Manager. Designed National YMCA wellness software; developed sales and marketing campaigns. Hired and trained sales consultants for all products; established independent manufacturers representatives network for key accounts.
- 9/83-10/1984: TRAINING Magazine; Conference Coordinator  
Prepared seminar descriptions and speaker biographies for national human resources conferences; coordinated all materials and schedules for events.
- 9/75-8/1983: Blaine High School & Community Education; Teacher/Instructor  
Taught stress management and career counseling workshops in CE; taught psychology, humanities, world history and American studies to high school students. Coached girls track & field and was pep club and cheerleader group advisor.
- 7/74-9/1975: Barrickman-Red Barron Advertising; Project Coordinator  
Tracked multiple advertising projects, advancing each stage of production to the next; coordinated client needs with account executives.

**Professional Association Membership/ Boards /Activities:**

Adler Graduate School of Psychology-MN, Board member, 3/2000-2/2001; 2003; 2015-Present  
Financial Therapy Association, Board member, 2012-2015, member 2010-Present  
International Association of Trauma Professionals, Member, 2011-2014  
Advisory Committee member of Nazrudin Group in Financial Social Work, 2012-Present  
LMFT Peer Group Supervision Coordinator/Participant, 2002-2007  
National Speakers Association, member, 2000-Present  
American Association of Marriage & Family Therapy (AAMFT) 2001-2009  
National Speakers Association-Minnesota Board of Directors 2002-2004; 2006; 2009-2011  
Board Member and President of Awesome Women 501c3 Education group 2005-2007  
Women Entrepreneurs Breakthrough (WEB) Group, Founder, 2000-2002  
Fundraising Committee, Adler Graduate School; 1999-2000  
North American Society of Adlerian Psychologists; member, 1997-2003  
Association for Financial Counseling and Planning Education; Member, 1997-2009  
Minnesota Women in Psychology, Member 1996-Present & Treasury Advisor, 2001-2003  
LUTC Training Council CE Instructor; 1994-1995  
Chamber of Commerce member and Presidents Training; 1989-Present  
Employee Assistance Program Counselor; 1994-2005  
Women's Educational Business Exchange, President; 1989  
National Association of Professional Saleswomen, VP; 1989-90  
National Association of Insurance and Financial Advisors; 1989-2004  
Financial Planning Association; 1993-Present  
Women's Leadership Council Advisory Board, AXA Advisors; 2003-2008

**Books Authored:**

*The Money Rascals: Changing Troublesome Habits from the Inside Out* / 1997  
*The Power in Your Money Personality: 8 Ways to Balance Urge to Splurge/Craving for Saving* / 2002  
*Rays of Hope in Times of Loss: Courage & Comfort for Grieving Hearts* / 2005  
*Mindful Money for Wealth and Well-Being: Help Clients Strike a Balance in Financial Planning* / 2014

**Books Contributing Author:**

*Tips from the Top: Targeted Advice from America's Top Money Minds* / 2003 Edie Milligan  
*The Obvious Expert: Turbocharge Your Consulting or Coaching Business Now* / 2004 Elsom Eldridge  
*The Push: The Power of Encouragement* / 2010

**Awards/Certifications:**

National Speakers Association-MN – Member of the Year, 2011  
CCTP – Certified Clinical Trauma Professional, 2011  
National 5-Star Top Financial Planners, 2008-2014  
Division Honor Associate-AXA Advisors 2002  
National Quality Award; 1992-2007  
Summit Award and Hall of Fame; 1998  
Centurion Award; 1992, 1996, 1998-2004  
Certified Fitness Specialist; 1985