FOCUS YOU

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NEWS

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Financial Coach Earns the CeFT™ from the Sudden Money® Institute

William Pitney becomes a Certified Financial Transitionist™

FOSTER CITY, CA (May 24, 2016) – FocusYOU is proud to announce that William Pitney, Financial Focus Engineer and Coach, is now a Certified Financial Transitionist™.

Pitney has witnessed many people struggle with decision-making when they are going through life-changing events. "All too often," Pitney contends, "they make regrettable and costly financial decisions." Pitney realized that he needed more than his technical expertise to help people survive their transitions.

"As a Certified Financial Transitionist™, I understand human transitions on their deepest levels. I know what influences the way we think and act when our world has suddenly and irrevocably changed. I'm able to identify when a transition is going well and I have tools to further enhance the experience. And if a client is struggling with their transition, I know how to keep them safe and help them work through their difficulties."

What is a Certified Financial Transitionist (CeFT™)?

Every person will experience at least one of the following major life transitions, and the likelihood that more than one at a time will be experienced increases with age.

- Inheritance
- Loss of a parent
- Loss of a spouse
- Divorce
- Major career change
- Retirement

- The sale of a business
- Insurance settlement
- Pro sports or entertainer contract

Whether they begin with an inheritance, the sale of a business, or both simultaneously, transitions thrust individuals and families into a position where what was once considered stable is suddenly in flux. Traditional financial planning definitely covers the bases when it comes to important topics such as taxes, investments, cash flow, and estate planning. But that's only half of the experience of financial change. The other half is the human experience.

The Sudden Money® Institute (SMI) has spent 16 years studying the psychology, sociology, and neuroscience of change. They've even delved into what thought-leaders in the business world say about change and adaptation. As important, they know that perceptions and expectations about change are powerful and can profoundly affect thinking and decision-making.

The Sudden Money® Institute created the Certified Financial Transitionist™ (CeFT™) designation to give financial planners and their clients science-based, field-tested tools and protocols designed specifically to merge the personal side and the technical side of financial change. This new designation comes only after candidates demonstrate fluency in the stages of transition, the use of SMI's proprietary materials, and the unique skill set of the CeFT™. That yearlong-plus process includes mandatory coaching, over 30 hours of coursework, and a 1.5-day Certification Exam that tests content, communication, and listening.

The result? Professionals who can create solutions that are customized for each client's unique values, relationships, and vision of the future.

About William Pitney

William Pitney, founder and financial coach of Focus YOU in Foster City and Santa Rosa, California, has been serving clients as a professional financial planner since 2003. The Institute of Consumer Financial Education recognizes Pitney as a Certified Personal Finance Instructor. He is a member of the Financial Planning Association, Sudden Money Institute, Center for Fiduciary Studies, and International Association of Registered Financial Consultants. Committed to a higher fiduciary standard of excellence, he has passed a rigorous certification and examination process in order to earn the professional designations of CERTIFIED FINANCIAL PLANNER™ professional and Accredited Investment Fiduciary®. Focus YOU delivers practical, fully integrated financial strategies and solutions to address the financial planning needs of clients. For more information, visit FocusYou.com.

About Sudden Money® Institute

Sudden Money® Institute (SMI) is a resource center for Life Transitions and Good Decisions. SMI helps Individuals and Families gain clarity and confidence regarding their life transitions by working with one of our nearly 100 Certified Financial Transitionists™. The Institute trains financial advisors and other professionals in Financial Transitions Planning, a unique set of process and tools for managing the human dynamics of financial change. SMI makes financial transitions less stressful, more productive, and frequently enjoyable. To learn more visit SuddenMoney.com

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