*Presentation:*

Fine to Flourish – Making Monitoring Meetings Fun Again!

*Presenter:*

**Meghaan Lurtz, Ph.D., FBS™**

Dr. Meghaan Lurtz is a leading global expert on the psychology of financial planning and a Partner at Shaping Wealth. A dedicated educator, she is a Professor of Practice at Kansas State University, teaching in the Advanced Financial Planning and Financial Therapy Certificate Programs. She is also a lecturer at Columbia University, where she teaches Financial Psychology. She serves on multiple financial technology boards, bringing together finances and mental health. She is an active researcher, writer, and ongoing contributor to the [Kitces.com](http://kitces.com/) platform, writing about the intersection of money, advice, and wellbeing. Meghaan has finished her Ph.D. in Personal Financial Planning at Kansas State University. Meghaan is a past President of the Financial Therapy Association.

*Session Description:*

Ongoing monitoring meetings get boring. Advisors and clients alike are not thrilled to be having the same meeting again and again where there is nothing new or exciting to report. Yet, when clients hit the “fine” phase of the client-advisor relationship, this can be the perfect time to start having “flourish” conversations and bring some fun back to the client-advisor relationship and transform the boring monitoring meetings. Join us and learn about thinking of the three phases of the client advisor relationship as fix, fine, flourish and the questions to ask clients that move them from fine to flourish which ends up brining the advisors back to where they are happiest, at fix.

*Learning Objectives:*

* LO #1: Examine on-going monitoring meetings and what makes them boring and how to know when clients are bored too.
* LO #2: Understand the fix, fine, flourish cycle to client advisor relationships.
* LO #3: Define flourish and identify the flourish components.
* LO #4: Review questions and meeting process for having flourish conversations.
* LO #5: Identify how to start having flourish-based meetings.

*Level of Complexity:*

* CFP / IMCA: Advanced
* NASBA: Basic

*How hours are determined:*

- Length of presentation – 50 minutes

*Topic Areas:*

* CFP: Financial Planning Process
* NASBA: Specialized Knowledge (Personal Financial Planning)

*Hour(s) of CE:*

* CFP: 1.0
* IMCA Financial Planning: 1.0
* IMCA Tax & Regulations: 0.0
* IMCA Ethics: 0.0
* NASBA (CPE/CE/CFP): 1.0
* EA: 0.0
* NASSA: 1.0

*Outline:*

Examine on-going monitoring meetings and what makes them boring and how to know when clients are bored too.  5 minutes

Understand the fix, fine, flourish cycle to client advisor relationships.  10 minutes

Define flourish and identify the flourish components.  10 minutes

Review questions and meeting process for having flourish conversations.  20 minutes

Identify how to start having flourish-based meetings.  5 minutes

* **Total:** **50 min**