

How to Feel Good about your Money



By Christina A. Nash, CFP® & Jodi M. Viaud, CFP® | Knox Grove Financial, LLC

What does it really mean to be in control of your money and what happens when money controls you? We've spent our careers helping people avoid the latter. It's one thing not to understand all the complexities of the financial world, but quite another not to have a grasp on your own personal finances.

Like it or not, we all need money and although we may agree that money doesn't guarantee happiness, it does pay the bills! More importantly, it gives you choices, and that's why it has always been our purpose to help our clients be in control of their money and their future.

We believe that you can't really make any meaningful changes unless you understand your relationship with money, what motivates you, what resources you have to work with, and what has been influencing your financial decisions. Your life experiences, going back as far as childhood, have a direct influence on how you handle money and what makes you feel financially secure.

Working with a financial professional who can help remove the anxiety associated with taking control of your finances is a good place to start. What should you expect from a knowledgeable and dedicated financial adviser?

At a minimum you want to work with someone who:

Understands your values: Whether it's family, security, freedom, or fitness, you want an adviser who understands how to help you align your goals with your values. What you care

about matters - it's the starting point for building a sustainable financial plan.

Helps you see the vision: What does your ideal day, week or year look like? What do you want retirement to look like? Dream or vision boards are helpful tools to have during this process, but the most important step here is working with someone who truly *listens* without judgement and will help you realize your vision.

Provides clarity: Financial journeys are life long and we all face different hurdles. Make sure your adviser is providing you with a clear, step-by-step process for achieving your financial goals. This should include a personalized, comprehensive financial plan focusing on what needs to be addressed now and in the future. Ongoing communication and updates on your strategy are equally important.

Consistently increases their skills and knowledge: You should expect your financial adviser to stay current with any legislation that will affect your financial strategy. One of the reasons all KGF advisers became CERTIFIED FINANCIAL PLANNER™ professionals is because we are committed to the financial planning process and the high ethical standard of always putting our clients' best interest first.

Works cohesively with your other advisors: It might not take a village, but it does take teamwork. If you're working with an accountant, attorney, or other professional adviser, you'll

want them to have access to, and feel comfortable working with your financial adviser.

Being in control of your finances is an amazing feeling. It means you know what's coming in, what's going out, and you have a plan to achieve financial success, whatever that may look like to you. It can change your whole relationship with money.

Wherever you are on your journey, it's never too late to take back the reins if you've veered off the path to financial well-being. When it comes to managing your money, we want to see you thrive and enjoy every step of the financial planning process. To get started on your journey or to just get back on the right path, contact our team at 609-216-7440.

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Wishing you and your family a happy and healthy Thanksgiving!

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