Financial Therapy Association

2021 CONFERENCE SCHEDULE

DAY 1

Monday, November 8th

9:45 AM EDT Mindfulness

with Mary Martin

Allocating time and resources to focus on well-being is a crucial part of any formal self-care plan. We become what we practice, and this session presents habits of well-being that can all be cultivated with some daily attention and intention to our actions and our way of being.

10:30 AM EDT Opening Session

with Sarah Swantner, FTA President, LPC, CFP®, CFT-I™ & Dr. Preston D. Cherry, FTA President-Elect, CFP®, PhD

11:10 AM EDT Breakout Session 1

Best Practices for Working with Transgender and Gender Non-Conforming Clients in Your Financial Therapy Practice

Megan McCoy, Ph.D., LMFT, CFT-I™, Goldie Prelogar, Meghaan Lurtz, Ph.D., & Kenneth J. White

Financial Socialization and Money Scripts: The Moderating Effect of Gender

Timothy M. Todd, Ph.D., J.D. & HanNa Lim, Ph.D.,

One Penny Makes One Million Dollars: Seven Topics to Consider When Helping Others to Organize for Financial Well-Being

Dr. Robin R. Norris, LMFT

12:10 PM EDT Keynote

with Dr. Sarah Newcomb

Simple Mental Habits to Improve Financial Wellbeing

1:10 PM Lunch Break

1:30 PM EDT Breakout Session 2

Writing Your Way into Financial Well-Being: A Narrative Financial Therapy Experiential Writing Approach

Dr. D. Bruce Ross, Ph.D., Megan McCoy, Ph.D., LMFT, CFT-I™, Ph.D., FBS™, & Emily Johnson, M.S., MFTA

Collegiate Financial Wellness: The Role of Financial Management Behavior and Financial Self-Efficacy

Tiffany Murray, Ph.D., AFC®, Dorothy B. Durband, Ph.D., AFC®, Charlene M. Kalenkoski, Ph.D., CFP®, & Catherine P. Montalto, Ph.D.

Could Behavior Change Related to At-Home Food Preparation Result in Increased Financial Benefit and Overall Wellbeing?

Hannah Walker, MA, LPC

2:30 PM EDT Breakout Session 3

Bridging the Money and Sex Divide: Essential Skills Building to Create Relationship Well-Being

Debra L. Kaplan

Overcoming Financial Infidelity with Solution-Focused Therapy

Megan McCoy, Ph.D., LMFT, CFT-I™, Katherine Baker, CFP®, Alex Bowling, Matt Brooks, Larry Buland, Taylor Cole, Andia Dinesen, AFC®, & Jodi Lonker

The Moderation Effect of Financial Anxiety Between Financial technology and Emergency Fund Savings

Ying Chen & Dr. Sarah Asebedo

3:30 PM EDT Breakout Session 4

How Perceptions May Influence Financial Help-Seeking from a Financial Therapist

Cherie Stueve, Ph.D, MBA, AFC®, FFC® Kristy L. Archuleta, Ph.D., LMFT, CFT-I™, Martin C. Seay, Ph.D. CFP®, John E. Grable, Ph.D., CFP®, & Janis J. Crow Ph.D.

Emotions and Financial Satisfaction: The Meditating Role of Financial Self-Efficacy in Retirees and Pre-Retirees

Olamide Olajide, MS, AFC®, & Dr. Sarah Asebedo

Siblings, Family Systems Theory, Guardianship, and Restoring the Triad

Meghaan Lurtz, Ph.D., Andrew Komarow, MSFS, CFP®, Julia Vassallo, & Elizabeth Yoder, CFP®

4:30 PM EDT Poster Sessions

Multiple posters on display by the following authors:

Diane Darling, Elena Yepes Evangelista, Anita R. Johnson, & Ying Chen

5:40 PM EDT Equity & Inclusion Panel Discussion

Join FTA E&I Committee members for a discussion on equity and inclusion

Financial Therapy Association

2021 CONFERENCE SCHEDULE

DAY 2

Tuesday, November 9th

9:45 AM EDT Somatic Presencing

with Gayle Colman, CFP®

In this self-care session, Gayle offers a somatic practice to access and attune to your body, and open the gateways for relaxation and nourishment. We inhabit our body to authentically relax. When relaxed, we can open our hearts and minds to what we are giving attention to – people, nature, art, etc. - free of mental constructs. Being present is an active practice sourced within our body. (No experience necessary. Openness to learning a plus. Please bring a yoga mat or blanket to the session.)

10:30 AM EDT Exhibit Hall

with FTA Vendors & Sponsors

11:30 AM EDT Keynote

with Brian Portnoy, Ph.D., CFA

The Disciplined Pursuit of Enough

12:40 PM EDT Breakout Session 5

The New Kid of the Block – IFS Informed Financial Therapy

Rick Kahler, MS, CFP®, CFT-I™, CeFT®

Evolving the Estate Planning Process: Uncovering Family Values in Legacy Conversations

Shelitha Smodic, CFP®, Kristy L. Archuleta, Ph.D., Josh Harris, MBA, CFP®, AFC®, & Megan McCoy, Ph.D.

Personality Traits and Life Insurance Ownership Among Older Americans

Dr. Preston D. Cherry, CFP®

1:30 PM Lunch Break

2:00 PM EDT Breakout Session 6

When Money Can't be Avoided: Helping Money Avoidant Widows Using the Changes and Grief Model

Deb Finnegan Biever, CFP®, Nipa Patel, Ashley Agnew, Daniel Kopp, CFP®; Jodi Krausman, CPA, & Megan McCoy, PhD., LMFT, CFT-I™

Couple Care Over Self Care: Utilizing Attachment Theory in Financial Therapy

Ed Coambs, MBA, MA - Counseling, MS - Financial Planning, CFP®, CFT-I™, LMFT

Financial Strain, Financial Stress, Financial Capability, and Alternative Financial Services: A Moderated Mediation Analysis

Timothy M. Todd, Ph.D., J.D.

3:00 PM EDT Keynote

with Sachin Patel

TBD

4:10 PM EDT Breakout Session 7

Eliciting African American and Latina/o Families' Money Stories: Small Group Conversations

Luis Antonio Tosado II, Ph.D., NCC, NCSC, Megan McCoy, Ph.D., LMFT, CFT-I™, Jacqueline Koski, M.S., CEPF, & Romualdo Mortel, AFC®

Exploring the Moderating Role of Self-Esteem: How does the Interplay Between Internal and External Support Factors Impact Young Adults' Financial Reliliency?

Josh Harris, CFP®, AFC®, & Dr. HanNa Lim

Tracking Financial Stress Before/During the COVID-19 Pandemic & Introduction of Short Version of APR Financial Stress Scale

Wookjae Heo, Ph.D., & Soo Hyun Cho, Ph.D.

5:10 PM EDT Concluding Remarks

with Sarah Swantner, FTA President, LPC, CFP®, CFT-I™

5:40 PM EDT Networking Opportunities

Multiple breakout rooms for small group conversations