THE PSYCHOLOGY OF MONEY HAPPINESS™ AND WEALTH

THEORY AND APPLICATION

Taught by published academics and practitioners in psychology and wealth management.

September 18-20, 2023

ALPHARETTA, GEORGIA

HELP IMPROVE YOUR CLIENTS' MONEY HAPPINESS™

What to expect:

- Learn how to deeply understand and build trust with current and prospective clients through the lens of psychology
- Learn cutting-edge Wealth Science™ techniques that may help your clients achieve better outcomes by understanding their needs and preferences across life events and market volatility
- Understand how personality traits of clients, beyond risk-tolerance, can help anticipate their financial behavior
- Learn how to help improve your clients' Money Happiness
- Understand generational differences and how they influence wealth transfer and money psychology
- Understand your own personality traits and how you create value for your clients
- Improve your communication skills to help guide clients to better decisions while building long-lasting relationships
- Apply hands-on coursework, cases and new tools to profile clients
- Get a first look at the patent pending Wealth Science Assessment for your clients and teams
- Intimate, small-group setting with direct access to psychology professors, financial planners and founders of the field of Money Happiness
- WITHOUT SPONSORSHIP AND ADVERTISING

Meet the Professors

Dr. W. Keith Campbell, widely cited psychology expert on personality traits
Dr. Patrick Doyle, data scientist and lead user experience researcher
Dr. Stacy Campbell, expert in generational psychology
Dr. Jim Exley, accomplished wealth adviser & published author on money psychology

What's Included for $5,000

- 1.5-days coursework and cases studies
- Gourmet meals, coffee bar and premium drinks

AGENDA

Sept 18 - Evening Cocktail Reception with Professors (6:30p)

Sept 19 - Cutting-Edge Theory

7:30-8a	Breakfast
8-8:30a	Welcome, Introductions and Expectations
8:30-10:00a	OCEAN: How Personality Works
10:00-10:15a	Break
10:15-11:45a	OCEAN and Money: How Traits Predict Financial Behavior
11:45-12:30p	Lunch
12:30-2:00p	Money Narrative: Stories people tell themselves about money
2:00-2:30p	Break
2:30-4:00p	OCEAN and Generations
4-5:00p	Psychology of Money and Relationships
5:00-5:30p	Break
5:30-6:30p	Cocktails with the Professors
6:30p	Dinner with the Professors

Sept 20 - Application

7:30-8a	Breakfast
8-9:45a	Wealth Science™ Case studies and Hands-on Practice
9:45-10:15a	Break
10:15-12p	Wealth Science Case studies and Hands-on Practice
12-12:45p	Lunch / Adjourn

To register, contact: jim.exley@wealthscienceatlanta.com
Learn more details: www.wealthscienceadvisors.net/conference

COMPARE US TO OTHER COURSES

	THIS COURSE	OTHER COURSES
TAUGHT BY FINANCIAL PLANNING PRACTITIONERS	✔	
TAUGHT BY PSYCHOLOGISTS	✔	
TAUGHT BY ECONOMISTS		✔
GRADUATE-LEVEL THEORY	✔	✔
CUTTING EDGE TECHNIQUES YOU CAN USE DAY 1	✔	
CASE STUDIES AND IMMEDIATE APPLICATION	✔	
SMALL, INTIMATE HANDS-ON WORKSHOP	✔	
ONLINE AND IMPERSONAL		✔
DINNERS AND COCKTAILS WITH PROFESSORS	✔	
SPONSORSHIPS AND PUSHY ADVERTISING		✔
INCLUDES ALL MEALS, DRINKS, MATERIALS	✔	
LEARN HOW TO IMPROVE CLIENT MONEY HAPPINESS™	✔	
ACCESS TO ASSESSMENTS TO USE WITH YOUR CLIENTS	✔	