PRESENTATION TOPICS
for Business Audiences

Speaker: HOLLY P. DONALDSON, MBA, MA, CFP®
970 Lake Carillon Drive, Suite 300
St. Petersburg, FL 33716
(813) 781-8040
holly@hollypdonaldson.com
www.hollypdonaldson.com

Bio: Holly has been a featured speaker on the psychology of money in diverse venues, from national association conferences to local client and donor appreciation events. Quoted in the *Wall St. Journal*, *InvestmentNews, Financial Advisor, Money and More* magazines, her area of interest is the psychology of money in personal, family, and business relationships.

Before starting her own practice in 2006, Holly spent 21 years in banking where she served as a Senior Vice President in the Private Wealth Management division. During her banking career, she was nominated by one of her clients and featured in Inc. magazine as a "Banker You'll Love."

Holly holds 2 master's degrees from the University of South Florida: an MBA in Finance and MIS; and an M.A. in Economics. She received her B.A. in Economics from Davidson College in 1986 and CFP® certification in 2004.

Her book, The Mindful Money Mentality: How to Find Balance in Your Financial Future (Porchview Publishing LLC, $17.95, available on Amazon and Kindle) was published in 2013. It was called “a must-read for clients at a personal and professional crossroads,” by *NAPFA Advisor* magazine.

Presentations: Holly is known for her authentic presentation style. Her presentations are relatable lessons of money psychology in life and business. By marrying stories of her client interactions with a background in behavioral economics and the psychology of money, she provides participants with practical uses of theoretical concepts. She is comfortable with or without PowerPoint. For sessions requiring CE credit, an outline, handout and PowerPoint presentation are available.

Social Media:
Twitter: @hollypdonaldson
www.facebook.com/PuttingMoneyInItsPlace
www.linkedin.com/in/hollypdonaldson
YouTube Channel: https://www.youtube.com/channel/UC7OP17Shg6jYMAZfqXTaM8Q

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—Topics—

The Psychology of Money and Relationships

Why do some people easily make major decisions about money, while others stall for years? What is it about a person's makeup that enables them to talk about money with ease, while others may avoid it? How does our upbringing change the money dynamic in our relationships? Why do we make spending, lending, borrowing, or investing decisions that we later regret?

In this survey of money habits, behaviors, and attitudes, participants will learn:

* 6 major motivations that drive our money decisions
* 7 money personality types
* How to bridge differences in money personalities
* How to evaluate when emotions are entering our own money behaviors
* How to evaluate proposals, professionals, and money decisions more rationally

The Psychology of Money Across Cultures

Does our view of money change depending on what culture we are from? How do my money beliefs differ from others and how does that shape my viewpoint and interactions? Are differences in ways we conduct business really due to culture, or to individual personalities?

In this look at psychological research across countries and cultures, participants come away with:

* Awareness of what kinds of business behaviors can be expected to differ across cultures
* What kinds of emotional motivations are common across humans, but result in different behaviors
* Tools for addressing cultural differences for more successful business interactions

Fast and Slow Thinking in Client Conversations (CE: basic to intermediate levels)

There are universal errors in judgment (behavioral biases) that we are hard-wired to make as humans. In any given client conversation, as many as ten or twenty of them can reveal themselves to us in different ways. For example,

* In the client's history (when the client says "I was stupid to do that"); or
* The client comes in with a new and different idea ("I saw this on TV");
* Or maybe we realize we are doing it to ourselves ("I knew better and still reacted badly")

Available live or via webinar, we review the ways in which we can discover and arrest fast, emotional thinking in favor of slow, rational decision making, both for our own good and for that of our clients.

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Testimonials

What participants say they learned from Holly's programs:

"I thought the presentation was excellent. I had a takeaway that has already fostered discussion in my office." Rick Kahler, MS, CFP®, CCIM, Founder, Kahler Financial Group

"Very effective presentation last week. I especially liked how you held your hand up to your head and recited that phone conversation with your client. You showed emotion and genuine that is so important when speaking before an audience. I hope we get to hear you again at TBEPC. We have so many speakers who get too technical. Your speech helped us relax and think about clients we serve." Johnathan Butler, Vice President, Wells Fargo Private Wealth Management

"I can now understand the question or concern better with clients and prospects." David Jones, CFP®, Edward Jones

"Love that the content is something I can go back and use with my clients immediately and with all of them," Attendee, FPA NorCal 2014

"The one thing I learned was to think more about how the customer perceives loss and risk," Nancy P. Crews, Ph.D., CEO and President, Custom Manufacturing & Engineering, Inc.

"The most important takeaway I had was to disconnect more consciously from emotions and emotional responses," Cindy Flores, Vice President, Global Trade & Supply Chain Solutions, Bank of America Merrill Lynch

"Holly's presentation caused me to remember to think before reacting," Irene Ferguson, Senior Vice President, SunTrust Bank

"Holly is extremely intelligent, knowledgable in the field, and superb at communicating points we need to understand. You engaged all of us 100% of the time, and we had fun learning from you! I could have listened all day. Wished it were longer." Terry Lubotsky, Trainer and Educator

"I truly enjoyed your webinar, and it certainly gives me insight to work with some of my advisors on why they don't get the responses they are looking for from their clients! I will do the same with my practice in working with clients. AND this will work perhaps with my teenager who I'm having a time in getting him to take ownership of his school work! I'll let you know how that works out and you may have opened up a new door with educators not being able to communicate to their students!! It's a stretch but I certainly think there is a connection. Thanks again!" Naomi Y. Scrivener, CFP®, Back Office Solutions, LLC

"Holly has been a frequent presenter at NAPFA's national and regional conferences. When she served on the faculty of NAPFA University, she presented on the psychology of sudden money issues (with Melissa Hammel); and on having the estate planning conversation (with Jeff Daniher, Blaine Dunn, and Dr. Ted Klontz). I would recommend Holly as a speaker, and look forward to her continued participation in future NAPFA conferences."
Robin Gemeinhardt, Sr. Manager of Professional Development and Education, National Association of Personal Financial Advisors

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SAMPLE CLIENT LIST

- National Association of Personal Financial Advisors
- Association of Fundraising Professionals - Suncoast Chapter
- Partners in Philanthropic Planning - Tampa Chapter
- Tampa Bay Estate Planning Council
- Financial Planning Association - National Conference (2013)
- CareBridge
- Greater Tampa Chamber of Commerce
- Garrison Asset Management
- Financial Planning Association - Orange County
- Financial Planning Association - Northern California
- Financial Planning Association - Central Ohio
- Financial Planning Association - Colorado
- Purposeful Planning Institute
- Low Load Insurance Services
- Alliance of Cambridge Advisors
- NAPFA - Midwest Region
- Positive Aging Conference
- BB&T Private Wealth Management
- NAPFA Genesis
- Tampa Bay Organization of Women in International Trade
- Low Load Insurance Services
- Estate Planning Council of Manatee County