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Jim Trull Earns Certified Financial Transitionist™ Designation After Completing 24-Month Program

Cary, NC (May 18, 2016) — We are proud to announce that Jim Trull is now a Certified Financial Transitionist™.

"As a **Certified Financial Transitionist™**, I understand human transitions on their deepest levels. I know what influences the way we think and act when our world has suddenly and irrevocably changed. I'm able to identify when a transition is going well and I have tools to further enhance the experience. And if a client is struggling with their transition, I know how to keep them safe and help them work through their difficulties."

What is a Certified Financial Transitionist (CeFT™)?

Every person will experience at least one of the following major life transitions, and the likelihood that more than one at a time will be experienced increases with age.

- Inheritance
- Loss of spouse or parent
- Divorce
- Major career change
- Retirement
- The sale of a business
- Insurance settlement
- Pro sports or entertainer contract

Whether they begin with an inheritance, the sale of a business, or both simultaneously, transitions thrust individuals and families into a position where what was once considered stable is suddenly in flux. Traditional financial planning definitely covers the bases when it comes to important topics such as taxes, investments, cash flow, and estate planning. But that's only half of the experience of financial change. The other half is the human experience.

The Sudden Money® Institute (SMI) has spent 16 years studying the psychology, sociology, and neuroscience of change. They've even delved into what thought leaders in the business world say about change and adaptation. As important, they know that perceptions and expectations about change are powerful and can profoundly affect thinking and decision-making.

The Sudden Money® Institute created the Certified Financial Transitionist™ (CeFT™) designation to give financial planners and their clients science-based, field-tested tools and protocols designed specifically to merge the personal side and the technical side of financial change. This new designation comes only after candidates demonstrate fluency in the stages of transition, the use of SMI's proprietary materials, and the unique skill set of the CeFT™. That yearlong-plus process includes mandatory coaching, over 30 hours of coursework, and a 1.5-day Certification Exam that tests content, communication, and listening.

The result? *Professionals who can create solutions that are customized for each client's unique values, relationships, and vision of the future.*

About Keystone Financial Partners

Keystone Financial Partners is an independent wealth management firm that specializes in helping successful individuals plan for and secure a comfortable retirement lifestyle. Located at 1255 Crescent Green, Suite 440, Cary, NC 27518, Jim specializes in working with pre-retirees, retirees and women in transition. To learn more about Jim Trull and his firm, Keystone Financial Partners, go to www.keystonefinancialpartners.com.

About Sudden Money Institute

Read more at http://www.suddenmoney.com/about-us

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