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Worried Clients Get New Options for Outdated Financial Plans

Victoria BC – In response to the current financial climate and the need for investors to take a more active role in money management, MoneyMinding Founder and CEO Tracy Piercy, CFP, has expanded her business services to include access to top-quality financial solutions as part of an overall financial consultation.

“I’ve been in the industry for 18 years now, and for over ten years I’ve been creating a financial education system that delivers a whole new way of looking at every area of personal finance. It’s designed so the decisions people make on a day-to-day basis support wealth creation and lifetime financial security,” says Piercy.” Now, I can back up that education with some of the best planning concepts and products local MoneyMinding Members have been asking for.”

Options for Tracy Piercy’s clients include a simple fee-based consultation; a consultation backed up with product implementation where the commission is credited back against the client’s consultation fee; education with the MoneyMinding Makeover and membership; and referrals to other MoneyMinding Advisors for complementary solutions.

Because the terms of engagement are so flexible, Piercy has adopted a compensation system that is rare in the financial field. The majority of fee-based advisors are actually paid a percentage of their clients’ assets under management. Piercy’s is a fee-for-service model, where consultation fees are agreed in advance, and product commissions, if applicable, are credited back toward the consultation fee.

Piercy, an international speaker and author of three books on personal finance, is looking forward to being able to guide her clients from planning right through implementation. “There are so many exciting financial concepts that very few people take advantage of because they lack the financial knowledge. Financial education is the missing link that clients need, and MoneyMinding members have been asking me to assist them in that way for a long time. With the ability to deliver all-in-one mortgages, RSP and RIF access programs, insured retirement plans and a variety of other solutions, I can help my clients move from concept to completion.”

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