

## Q&A with Financial Life Planners

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### **Q: Where are you from and what did you do before opening your business?**

A: I am originally from Sierra Vista, Ariz., and graduated from Arizona State University. Prior to founding Financial Life Planners, I was a financial planner at American Express and Paine Webber. I also served as a financial services manager at First Interstate Bank (now Wells Fargo Bank) where I became an expert in the conventional and creative real estate loan process.

### **Q: Why did you open your business in Ahwatukee Foothills?**

A: This has been my home for more than nine years and I've found that the climate, culture and business community of Ahwatukee are all a good match for me. I couldn't think of a better place to launch my business, and I established my independent financial services firm here in 1999.

### **Q: How did you get the idea to open your business?**

A: I had excellent mentors in my career who helped me acquire a solid foundation in traditional financial advising, and also to see and trust my natural acumen for this work. But it was actually my desire for work-life balance that got me started contemplating my own business. Daily commuting and the stress of working for someone else and following their investment philosophy made me realize I had more to offer clients and this was just the impetus I needed. I also wanted to spend more time with my children.

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**Q: What type of merchandise/services do you sell?**

A: Initially I focused on traditional investment advisory services, but as the global financial situation evolved and as patterns began to emerge in my clientele, I saw that my mission needed to evolve as well. What my clients and I experienced is that their financial success wasn't just a matter of how well we managed their money, but also in my showing them how to manage their beliefs, attitudes and actions about money.

So, in 2002 I expanded my practice to include financial life planning and created a proprietary, 6-stage Financial Life Planning process. It is exclusive to my company, Financial Life Planners, and helps clients uncover information about how their current money beliefs are supporting or hindering their financial well-being. Using this process, I'm able to give them a dynamic, personalized financial strategy as well as the tools to inspire, focus, and guide them in their wealth-building practices so that they can prosper throughout their entire lives.

**Q: What does your business have in store for the future?**

A: I love to teach. And because women often face challenges in their relationship to money and control almost half of the nation's wealth, I'm establishing an educational service to use my extensive expertise to instruct and guide women to approach their financial health in an entirely new way. I lead a seminar called, "Women, Wealth, Why Not?" and am writing a book called *The New Girls' Club: How to Build Your Personal Fortune without Relying on the Old Boys' Network*, that is planned for release in the fall of 2010.

**Q: Anything else you want the community to know about you or your business?**

A: I have 20-plus years in the field of finance and investing, I manage more than \$20 million in assets, and I have one of the highest levels of fiduciary responsibility in the industry. But what makes me stand apart is my approachability, my openness to my clients' ideas. I talk about money in language that clients can retain and use and I make sure they understand and feel good about their investments. Also, I'm a fee-only adviser, which means the customized financial life plan I craft for each client is focused on growing assets that are not linked to commissions.