**AGPA Connect 2023 Presenter Information**

**Course Code:** 16

**Course Title:** Surfacing Hidden Financial Trauma in Group in a Nanosecond

**Course Times:** 2:30 PM - 5:00 PM

**Course Dates:** Thursday, March 9

**Instructors:** Richard Kahler

Jennifer Joseph

**Course Description:** Group therapists are more comfortable facilitating discussions of clients' most intimate sexual details than talking about their money issues. The intense shame most therapists and their clients carry about hidden financial trauma makes it a taboo topic in most groups. This workshop uses real money exercises, mindfulness reflection, and didactic processes to promote healthy attachments to money in practitioners and clients. Please bring an amount of cash in small bills you are willing to lose.

**Learning Objectives**

The attendee will be able to:‎

1. ‎ Describe and identify disordered and problematic money behaviors formed by early childhood ‎trauma.‎
2. ‎Describe the experience of accessing your thoughts, feelings, beliefs, and problematic money ‎behaviors using real money in group exercises.‎
3. ‎Identify personal disordered money and problematic money behaviors in yourself that may cause ‎you and the therapeutic relationship harm.‎
4. ‎Identify your most influential money scripts and money type.‎
5. ‎Explain the process of completing the KMSI-R and the KMBI-R evaluations.‎

**Significant Articles:**

1. Gale, J., Goetz. J. & Bermudez. M. (2009). Relational Financial Therapy - The not-so-surprising ‎relationship of money to relationships. Family Therapy Magazine. September/October. 25-29.‎
2. Klontz. B, Klontz. P. Bivens. A. Wada. J. & Kahler. R. (2008). The Treatment of Disordered Money ‎Behaviors: Results of an Open Clinical Trial. Psychological Services. 5(3). 295-308.‎
3. Klontz. B, Britt. S. Archuleta. K. (2015) Financial Therapy. Switzerland: Springer International
4. Klontz. B, Britt. S. Mentzer, J. & Klontz. T. (2011). Money beliefs and financial behaviors: Development ‎of the Klontz Money Script Inventory. Journal of Financial Therapy. 2, 1-22.‎
5. Klontz. B. Kahler. R. Klontz. T. (2016) Facilitating Financial Health. Kentucky: NUCO‎

**Agenda:**

1. Administrative, housekeeping, and introductions (15 min) - Rick
2. Description of Countertransference issues of money (30 min, lecture, LO I, 3) - Rick

* Money issues in a group go far deeper than issues around our fees
* Are you more comfortable discussing your clients' most intimate sexual details than talking about money.
* Money Scripts and taking the KMSI-R evaluation (LO 5)
* Money disorders (DSM-5) and problematic money behaviors and taking the KMBI-R (LO 5)

1. Demonstration Group of Accessing Financial Disorders Using The Group Process (50 min. group process, LO 2) Jen/Rick

* Money at the feet
* Impact of giving money
* Impact of asking for money
* Impact of tearing up money
* Impact of leaving with the money you have

1. Debriefing the demonstration group (30 min, group process, LO 4) - Jen

* Review disorders and problematic behaviors and update awareness that arose
* Discussing and processing personal and professional concerns around money

1. Questions and Answers ( 15 minutes) Rick/Jen
2. Participant Evaluations ( 10 minutes)

Assessment Questions: Question 1 (include possible answers)

Question 1 (include possible answers)

What is a way to surface Money Scripts quickly with a group member? A) Ask them to list their top 3 B) Evaluate responses to questions about financial trauma C) Administer the KMSI-R D) Do the Money Script brainstorming exercise

Correct Answer 1

C

Question 2 (include possible answers)

How many disordered (DSM-5) money behaviors are there? A Seven B Seventeen C Five D Three

Correct Answer 2

C

Question 3 (include possible answers)

How many problematic money behaviors are there? A Seven B Seventeen C Eight D Five

Correct Answer 3

C

Question 4 (include possible answers)

Using real money to surface money issues A Is a powerful and quick way to help group members surface their money scripts and behaviors B Is a powerful and quick way to help group members resolve their money issues C Is not recommended to use with a group D Is a powerful and quick way to find out a group members net worth

Correct Answer 4

A

Question 5 (include possible answers)

Money Scripts fall into how many categories: A One B. Five C. Four D. Six

Correct Answer 5

C

Question 6 (include possible answers)

Most therapists have addressed their countertransferance issues with money: A. As a requirement of licensure. B. As a requirement of graduating. C. As a requirement of employment D. Only if they have recognized that money issues are significant and have done their own personal work around their financial trauma and beliefs.

Correct Answer 6

D

Question 7 (include possible answers)

The four Money Scripts fall into which four categories: A. Avoidance, Worship, Power, Vigilance B. Vigilance, Status, Contentment, Avoidance C. Engagement, Vigilance, Status, Power D Avoidance, Worship, Status, Vigilance

Correct Answer 7

D.

Question 8 (include possible answers)

Hurtful money behaviors are the result of: A. Generational Money Scripts B. Trauma C. Money Scripts D. All the above.

Correct Answer 8

D

Question 9 (include possible answers)

If a group member presents with trauma resulting in a problematic financial behavior, one effective way to help them address the financial issues of the trauma.is: A. Ask them to leave group B. Avoid discussing the financial aspects of the trauma C. Refer them to a Certified Financial Therapist-I that will collaborate with you, with the permission of the client. D. Charge ahead and deal with the financial advice yourself.

Correct Answer 9

C

Question 10 (include possible answers)

Dealing with financial trauma and problematic financial behaviors in clients A. Is taught in all masters level therapeutic programs B. Is straightforward and easy C. Is a new field that's emerged in the last 15 years known as financial therapy D. Takes no special training whatsoever.

Correct Answer 10

C