



NEWS



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Mindfulness could be the secret to a financial advisor's success

Financial Advisor magazine publishes white paper by Mindfulness-Based Financial Wellness founder, Joe Lowrance, on how mindfulness can positively impact a financial advisor's effectiveness, client relationships and bottom line.

ATLANTA - Dr. Joe Lowrance, psychologist and founder of [Mindfulness-Based Financial Wellness](http://www.m-bfw.com) in Atlanta, has some advice for financial consultants: "Learn to practice mindfulness."

In a white paper, "[The Mindful Financial Advisor](#)," published this week in Financial Advisor magazine, Dr. Lowrance writes that financial advisors are discovering the power of mindfulness as a valuable tool in improving workplace operations, productivity, customer service, employee health and well-being, and the bottom line.

"The research indicates that practicing mindfulness can help create win-win opportunities for financial advisors by increasing positive outcomes for both the advisors and their clients," said Dr. Lowrance.

Mindfulness is about "understanding what our experience is in the moment," said Dr. Lowrance, who has practiced mindfulness for over fifteen years. The Atlanta psychologist also trains financial advisors in mindfulness through his company, Mindfulness-Based Financial Wellness.

Drawing from extensive research, Dr. Lowrance noted that mindfulness can help financial advisors in numerous ways including gains in concentration, mental clarity, resilience and stress reduction, executive functioning, memory, and decision-making. "Mindfulness also supports improved emotional intelligence and relational and communication skills - all important factors to performance and results," he said.

"The Mindful Financial Advisor" white paper includes useful charts and exercises as well as quotes from financial advisors who practice and incorporate mindfulness into their professional and personal lives.

Bernie Geiss, a Certified Financial Planner™ from Vancouver, believes that “a mindfulness practices is essential By being more present and focusing on developing ourselves at the individual level, we grow healthy, positive attitudes and become more effective at our jobs.”

Mindfulness typically enters the financial advisory workplace, either by financial advisors developing their own practice independently or by organizations initiating mindfulness-based training programs to employees.

Financial advisor Shkira Singh of Los Angeles noticed valuable changes after she introduced mindfulness to her staff and their workplace culture. “My employees say mindfulness and the practices have changed their lives,” she is quoted saying in Dr. Lowrance’s white paper. “They are happier at work, nicer to each other, better team players ... all of which has led to increased productivity and supported growth in profits.”

“Mindfulness-based financial advisors are well positioned to help their clients become more mindful in their financial lives,” writes Dr. Lowrance. “Through mindfulness, clients learn to become more self-aware and break old habits that interfere with healthy money choices and staying on track with financial goals.”

For financial advisors wanting to bring mindfulness to their workplace, Dr. Lowrance is offering [The Mindful Financial Advisor Retreat](#) June 6 in Atlanta. The retreat, approved by Certified Financial Planners™ for eight hours of CE credit, trains advisors about mindfulness and how to incorporate being mindful in their daily work.

ABOUT

[Mindfulness-Based Financial Wellness \(MBFW\)](#), founded by Dr. Joe Lowrance, is based in Atlanta. The consulting company offers four certified continuing education courses for financial advisors in mindfulness financial training. The courses include the company’s [flagship eight-week course](#), Mindfulness-Based Financial Wellness, for both financial advisors and the general public.

For more information about those programs and MBFW, go to www.m-bfw.com.