My Retirement Network

# FINANCIAL FLUENCY™ FOR ADVISORS

*CFP® CE Training That Strengthens How Advisors Communicate*

**Built by My Retirement Network. Teaching advisors to speak human.**

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Financial Fluency™ teaches financial professionals how to reframe technical guidance through the lens of trust, clarity, and emotional resonance. The modules are entirely self-paced and CFP® CE-eligible, built for practical, real-world use, not theory.

**Who It's For:**

Firms that want to strengthen advisor communication skills, improve client retention, and offer something practical beyond product training. Any advisor can benefit from this series - from early-career advisors looking to build confidence and trust to veteran advisors who may not realize how much of their language has become technical shorthand.

**Why It Works:**

These modules were created after years of working with advisors and watching communication misfires derail trust, stall progress, or cost the firm a relationship. The training blends industry language with real-life emotional nuance - teaching advisors how to speak both fluently.

At the end of the day, advisors aren't just explaining strategies, they're helping someone protect the most fragile and hard-earned thing they have: their nest egg. Most people just want to know: Will I be okay? Can I handle a crisis? Can I enjoy life a little?

Because behind every question about taxes or drawdowns is usually a deeper fear: Will I run out of money? Can I afford to live the life I want without jeopardizing my future? Financial planning touches people at their most vulnerable - and how we communicate that plan matters.

**How to Implement:**

These courses can complement your existing training or become part of a new training initiative. The courses can stand on their own or be followed up with live virtual group coaching sessions.

We can also build a custom landing page within MyRetirementNetwork.com (*e.g., /yourfirmname*) to give teams easy, branded access or licensing for internal LMS distribution is open for discussion.

**Purchase and Information:**

Our current courses available for purchase can all be found on this page:
https://myretirementnetwork.com/for-financial-advisors/

Also feel free to contact us for further information on corporate training and coaching availability:
support@myretirementnetwork.com

**The Story Behind Financial Fluency™ for Advisors**: *A Journey That Was Never Just One Idea*

A finished product often looks like it came from one clean, bold idea - but this didn't. Financial Fluency™ for Advisors was built slowly, layer by layer, through real-world observations and years of experience.

We started My Retirement Network with one goal: to create clear, accessible, and unbiased financial education for everyday people. No hidden agenda. No sales funnel. Just real content designed to help people make smarter decisions with confidence. That work evolved into planning tools, explainer articles, and webinars.

But something else was forming behind the scenes.

Over and over, we saw how quickly trust can erode when someone doesn't understand what their advisor is saying. Not because the advice is bad but because it doesn't feel personal. It starts to sound like a pitch. Or worse, a formula.

We heard from people who had financial advisors, but still didn't understand their own plan. The disconnect wasn't about knowledge, it was about language. Empathy. Clarity. And the ability to make complex ideas feel relevant and real.

Our founder had spent years coaching advisors one-on-one. The impact was clear - not just in business outcomes, but in how much more confident and connected those advisors felt. But personalized coaching isn't always scalable. Smaller firms and solo advisors don't always have the time or budget to commit to intensive programs.

That's when we knew it was time to build something new - a self-paced, cost-effective way to teach the core communication principles we had been developing all along. Something that could bridge the gap between expert advice and client understanding.

That became Financial Fluency™ for Advisors.

We didn't create this because we think advisors need to be taught how to do their jobs. We created it because we've seen how powerful their expertise becomes when it's delivered in language people trust, understand, and remember.

***Founder Profile***
*Melissa Caro brings 30+ years of experience in finance, with a background spanning equity trading, research sales, and strategic marketing. She holds FINRA Series 7, 63, and 24 licenses (via the MQP program), is a CFP® professional, and has earned multiple specialized credentials in financial education and identity protection. Under her leadership, My Retirement Network has been featured in AARP, Bloomberg, CBS News, CNBC, Financial Planning, Fortune, Investor's Business Daily, Investopedia, Kiplinger, MarketWatch, MSN Money, Reuters, TheStreet, ThinkAdvisor, U.S. News & World Report, and The Wall Street Journal.*