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 Message from our Founder**

*A Journey That Was Never One Single Idea*

**"I didn't create this because I thought I could teach advisors how to do their jobs. I created it because I know how much more powerful their expertise becomes when it's delivered in language people trust, understand, and remember. "**

A finished product often looks like it came from one clean, bold idea - but this didn't. The truth is, Financial Fluency™ for Advisors was born from dozens of observations and insights, layered over time.

I built My Retirement Network to create accessible, unbiased financial education for everyday people. No hidden sales pitch. No lead funnel. Just real content built to empower consumers to make informed decisions. That evolved into planning tools, explainer articles, and webinars.

But something else was forming behind the scenes. As I worked with financial advisors through coaching, collaboration and training, I saw the same thing over and over: advisors with immense technical expertise who were struggling to connect.

What I started to see clearly was this: when people don't understand what their advisor is saying, trust erodes. Not because the advice is wrong, but because the person on the other side doesn't feel *heard*. It starts to feel like a pitch, or worse, a formula, where answers are recycled.

Too many advisors were answering questions no one asked, using words their clients didn't understand, and mistaking complexity for credibility. The disconnect wasn't a knowledge problem. It was a language problem. It was a matter of showing empathy, listening better, and translating technical concepts into language that made people feel understood.

It hit me one day: I'm out here encouraging people to learn the basics, to push through the jargon and then sending them right back into a world where many advisors still speak in code. That's when it clicked: the missing link wasn't more education for clients, it was better communication from advisors.

While live coaching worked - advisors started closing more business, clients felt more understood - it wasn't scalable. So I began to map it out. If I couldn't be in the room with every advisor, what would I want them to hear? What needed to be modeled, shown, and practiced? The result - Financial Fluency™ for Advisors.

***Founder Profile***

*Melissa Caro brings 30+ years of experience in finance, with a background in equity trading, research sales, and strategic marketing. She holds FINRA Series 7, 63, and 24 licenses (via MQP), is a CERTIFIED FINANCIAL PLANNER™ professional, and has earned several specialized credentials in financial education and identity protection. Under her leadership, My Retirement Network has been featured in Bloomberg, CNBC, Fortune, Fox Business, Kiplinger, MarketWatch, The Wall Street Journal, and more.*