

# NEWS

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Purposeful Planning™

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Barbara Culver, CFP®, CLU, ChFC, AEP

## Barbara Culver Hires Impact Communications to Promote Purposeful Planning™ System

*Programs Help Advisors Differentiate Themselves in the Marketplace, Cultivate Relationships with Affluent Clientele*

Cincinnati, OH (March 10, 2009) – Barbara A. Culver, co-creator of the Purposeful Planning™ system, today announced that she has hired Impact Communications to promote the Purposeful Planning programs to financial advisors, estate planning attorneys, therapists and non-profit development professionals. Culver and the Purposeful Planning faculty offer training and development programs geared to helping these four key professional disciplines work more effectively with an affluent clientele.

“There’s a shift occurring in our practices, our relationships and our society,” said Culver, who is also a principal of the financial planning firm Resonate, Inc. “People who have achieved substantial financial success are starting to ask themselves, ‘What else is there?’ As advisors, we need to be able to help them work through all of the questions and issues associated with that.” In addition, seasoned advisors running a technical advisory practice may find their daily work repetitive. Advisors are asking themselves whether their professional legacy is simply about preserving assets or whether it is about preserving families.

“In these difficult times, professionals are looking for ways to add value for their clients,” said Marie Swift, President of Impact Communications. “Those who want to excel know the importance of differentiating themselves from the pack. Purposeful Planning offers advisors the training they need to help clients uncover and articulate the values that have enabled them to achieve success – and to help them pass these along as part of their legacy,” Swift said.

While some professionals may say that their clients are unwilling to do the personal work required, Culver and her colleagues believe that it’s simply that no one has shown them the way.

“Most wealth creators know that money is not the endpoint of their life purpose. These people need leadership and professional guidance to define the right questions and seek out the most appropriate answers,” added Culver. “They need a way to convert the answers to action in their family experiences and relationships – and that’s precisely what the Purposeful Planning Process does.”

#### **About Barbara Culver, CFP®, CLU, ChFC, AEP**

Barbara A. Culver is nationally known by her peers as a financial and legacy planner, speaker, consultant, and author. Barb has co-authored the books: *Getting to the Heart of the Matter*, *For Women By Women: Financial Passages* and *Giving: Philanthropy for Everyone*. Unlike most professional advisors who bring a transactional approach to planning, Barb distinguishes her company with client-centered legacy planning. She consults extensively with professional advisors and the financial services industry in the area of purposeful planning, speaks nationally on this topic, runs a private financial and estate planning practice and consults with various non-profits around the nation regarding building their endowments using client-centered legacy strategies. This process integrates all aspects of the clients’ lives – financial, emotional, social and spiritual. She then aligns “who people are” with “what they have” through state-of-the-art plan design. Since Barb is a leader in the client-centered legacy approach, she is a much sought after industry speaker. She also serves as Editor-in-Chief of the Commerce Clearing House *Journal of Practical Estate Planning*, has appeared on CBS “*This Morning*”, CNBC “*Money Talk*” and *National Public Radio*, and has given interviews to *Money Magazine*, *the National Underwriter*, *the Wall Street Journal*, *New York Times*, *Financial Planning* and *Town & Country*. For more information, visit [www.purposeful-planning.com](http://www.purposeful-planning.com).

#### **About Impact Communications, Inc.**

Founded by industry veteran Marie Swift in 1993, Impact Communications specializes in developing effective client communications and marketing strategies for a select group of highly successful financial advisors and allied institutions. Widely respected as a marketing professional with a loyal following, Swift, along with her team, works with independent advisors and select institutions to increase both visibility and credibility within their niche markets. In addition to marketing strategy and media promotions, the firm offers clients graphic design services and executive coaching. For more information visit [www.impactcommunications.org](http://www.impactcommunications.org).