WidowWise™
MONEY WISE

Guiding Widowed Clients with Confidence

What Every Advisor Needs to Know

OVERVIEW In the United States, 1.5 million people lose their spouse annually. More than 800,000 are in financial crisis and need professional assistance. Yet, nearly 80% of widowed clients leave their advisor within 12 months of loss. Clearly, even experienced advisors aren't doing what they should to retain these valuable clients. Through impactful stories, statistics, and actionable strategies, this session explores the unique financial and emotional challenges faced by newly widowed clients. Participants will gain insights and tools to provide empathetic, comprehensive guidance that fosters confidence and trust, ultimately leading to stronger client relationships, retention, and practice growth.

What Advisors Will Learn

1. **Understand the Unique Financial and Emotional Challenges of Widowhood**
   Gain insights into the profound financial and emotional struggles faced by newly widowed clients, including changes in income, legal complexities, and vulnerability to exploitation.
2. **Provide Empathetic, Comprehensive Guidance as a Trusted Partner**
   Learn to combine financial planning with crisis management while serving as a compassionate, proactive advisor who avoids common pitfalls and helps clients rebuild their financial independence through tailored advice and trust-building strategies.
3. **Implement Practical Tools and Techniques for Better Outcomes**
   Leverage resources such as credit reviews, organization strategies, and best practices to create actionable financial plans that deliver effective results while fostering long-term relationships with widowed clients.

"It was the best presentation I've ever heard."

- Jim Brass, Merrill Lynch, 50-Year FPA Member

Detailed Session Outline (60 minutes)

1. Introduction and Objectives *(5 minutes)*
2. Widowhood by the Numbers *(5 minutes)*
3. Unique Challenges for the Newly Widowed *(10 minutes)*
4. Maria's Story (Case Study) *(10 minutes)*
5. Financial Impact of Loss *(10 minutes)*
6. Building a New Approach *(10 minutes)*
7. Case Study: Maria's Next Steps *(5 minutes)*
8. Why This Matters for Advisors *(5 minutes)*
9. Q&A and Call to Action *(5 minutes)*

About the Speaker

Chris Bentley CFP®, CLU®, CRPC®, BFA™, MBA

- Founder & Executive Director, Wings for Widows
- Managing Director, WidowWise University & Widowers Support Network
- FPA Member, Contributor to The Journal of Financial Planning
- FFP Grantee
- CFP Board Sponsor
- Author of “The Newly Widowed Guide to Financial Wellness” (Third Edition) and “The Legacy Planning & Conversation Guide: A Workbook for End-of-Life Planning”; and, numerous research papers

Recent Speaking Engagements

- FTI Annual Conference (2025)
- All-Ohio Symposium (2025)
- FPA Columbus OH (2024)
- FPA Dallas/Ft. Worth (2024)
- FPA Annual Conference (2023)
- FPA Charlotte Conference (2023)
- FPA Philadelphia (2023)

Additional Resources

Financial advisors have access to two valuable resources:

1. **Complimentary eBook:** “Empowering New Beginnings: A Financial Advisor’s Guide to Supporting Widowed Clients” provides a detailed framework for serving newly widowed clients, covering critical topics from understanding grief stages to navigating complex financial transitions.
   Available as a free download on our website.
2. **The Newly Widowed Guide to Financial Wellness** (Third Edition): A comprehensive guidebook that walks readers through the essential steps of early widowhood, offering actionable strategies and expert insights for this challenging transition.
   Available for purchase on Amazon.

Continuing Education

- 1.0 CFP CE Credit
- NASBA Category: Specialized Knowledge and Applications
- Course Level: Intermediate
- No Exam Required

BOOKING INFORMATION FOR 2026

VIRTUAL SESSIONS:
$500

IN-PERSON:
$1,500 + Travel Expenses

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