



Resolve to Detox Your Finances in 2021

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I admit it. I sipped many virtual happy hour drinks and binged on comfort foods to initially cope with COVID-19. I regularly rationalized my choices. They offered enjoyment and relief during a stressful time. However, by late summer when my favorite summer dresses did not fit for special backyard barbecues with my husband, I painfully realized that my short-term decisions might have longer-term consequences.

Seeking more than weight loss, I signed up for my first ever nutritional detox program. The experience was profound. Not only did I learn how to adjust my eating and improve my self-care for optimal health, the experience became a powerful metaphor for many of my clients' work with me, cleansing themselves of toxic financial choices and enhancing their financial wellness over time.

Choose an Experienced Professional You Trust

I decided to do the nutritional detox because I needed more than weight loss. I craved a renewed relationship with food. I knew that I would be most successful doing this if I was informed and inspired along the way by a competent and compassionate coach. So, I signed up for a program designed and led by an Integrative Medicine physician that I respected and trusted to guide me.

Many clients choose to work with me for similar reasons. Often the death of a loved one, an inheritance, or a desire for "something more than just returns" from their investments inspire new clients to leave advisors that have managed their family finances for years. Clients seek us out because we are fiduciaries; professionals who always serve clients' best interests. Clients value our experienced, caring advice to support them in becoming financially healthy.

Follow a Proven, Holistic Approach for Success

The physician who developed the nutritional detox program incorporated years of her own professional experience with insights from other specialists that she trusted. Her program was rooted in meal plans, recipes, and nutrients that she and her patients found most beneficial over time. Complementing this structure were insights from a Certified Health Coach and virtual classes led by specialists in yoga, meditation, and Pilates that the physician organized. As a result, I gained heightened awareness of my current eating and self-care behaviors, knowledge for how to change them, and confidence to adjust my approach.

Similarly, clients' financial health benefits from my years of professional experience. I guide clients through a structured and flexible financial planning process that I have developed over time with hundreds of clients. I look holistically at all pieces of clients' financial picture and diagnose clients' financial pain points and prescribe remedies like changes in financial choices to alleviate stressors. Regularly I work with clients' CPAs and Trust & Estate Attorneys as well as independent dedicated insurance specialists. Sometimes we identify the root causes of clients' chronic planning ailments. Other times we enhance clients' existing plans for sustained wellness in response to clients' life changes or dynamic tax and estate planning policies. Over time, my team regularly monitors clients' financial vital signs, adjusting our approach as needed when life does not happen according to plan.

As a result, my clients experience peace of mind as they continuously make choices to optimize their financial health.

Retain Focus on Wellness Over Time

The nutritional detox reinforced for me that I can influence my health for the better. Regardless of where I am today on my health journey, I can make new and different choices to positively shape my way forward. I take comfort that when I get overwhelmed, get tired of preparing food from scratch, or just want to binge, these are valid feelings that require acknowledgement. And if, after recognizing these emotions, I struggle to retain healthy behaviors, I can seek the expert counsel of my trusted Detox Doctor and network of health professionals to re-assess what's going on, course-correct (again), and stay on the long-term path to health.

In the same way, clients who work with me realize that they can influence their financial health for the better. They see the opportunity that comes with owning their wealth today and over time. Clients trust my team to understand what is important to them and offer financial strategies that they can use to make new and informed decisions for their future. When life changes and causes frustration or upset, clients know that my team and I are going to be there for them. We will be by their virtual side continuously, offering advice to support them in their quest for financial wellness.

If you seek more clarity, comfort, and confidence in your financial life, resolve to detox your approach in 2021 and allow me the privilege of a complimentary, confidential initial consultation.

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