



# Tracy Piercy, CFP

Founder and CEO of MoneyMinding International Inc.  
Founder of The MoneyMinding Foundation

[www.moneyminding.com](http://www.moneyminding.com)  
877-764-6444

**Tracy Piercy, CFP**, is an expert in behavioral finance and financial literacy; an expertise that began developing in the early 1990's. She does not practice as a financial professional today, rather devotes her time to supporting financial professionals and their clients and employees with the revolutionary lifestyle approach to personal finance she calls the MoneyMinding Methodology. Her industry experience includes success in insurance, banking, investments, business and education.

## **From 6-Figure Professional Practice to Entrepreneur and Financial Educator**

Tracy was a top producing investment advisor with one of Canada's largest investment firms, CIBC Wood Gundy, when she sold her 6-figure practice to concentrate on financial training. The result of years of study and personal experience is a niche specialty in applied behavioral finance and financial literacy. Tracy introduces a whole new way of looking at every area of personal finance so that decisions people make on a day-to-day basis support wealth creation and lifetime financial security. Furthermore, her approach is based on a solid financial planning foundation that connects financial professionals and consumers in a way that enhances results for everyone involved.

## **Combining Real Life Experience, Financial Planning and Success Teachings**

Tracy's vision began when she recognized the gap between conventional teachings on personal finance and client reality – a fact highlighted when one of her high net worth clients could not resolve his money worries with traditional reassurances. Delving into the teaching of world-renowned success teachers such as Tony Robbins, Robert Kiyosaki, Michael Gerber, Mark Victor Hansen, Robert Allen and Napoleon Hill, and combining their wisdom with what she already knew from her years as a financial professional, Tracy uncovered a whole untapped vein of advisor/client relations: it begins with a client's individual values and ends up with a complete plan for personal financial security and the means to carry it out, in a way that works for them personally.

Not long afterward, Tracy's new knowledge and vision were tested in a period of her own personal financial loss, coinciding with a series of family crises. These real life difficulties involved people Tracy loved and made her realize financial setbacks are temporary and minor unless those who experience them make them into something permanent. Using her new system, Tracy and her husband began to rebuild, and were able to experience first hand that financial freedom from stress is possible for anyone – regardless of their current situation.

## **Delivering a Marketing and Client Development System**

Today, the company she founded, MoneyMinding is a marketing and client development system that equips a global network of financial professionals to deliver financial education and promote professional alliances as tools to build strong, profitable client relationships.

Tracy shares a collection of exercises on developing the mindset for financial success in her books: *Enlightened Wealth*, available in a compact manual or in journal form; and *The 12 Simple Steps of MoneyMinding: The Foundation for Expanding Financial Possibilities in Your Life*. Her most recent book is *Moneyology: Integrating the Psychology of Success with Real-Life Strategies*. Tracy has also written the *MoneyMinding Makeover* home-study course, dozens of

articles and special reports. She is an international speaker and has been featured on radio, television and print throughout North America.

### **Highlights of Tracy Piercy's Speaking and Teaching Experience**

- Keynote speaker engagements: Professional women's organizations such as Women's Business Network, Young Women of Distinction and eWomenNetwork;
  - ✓ Financial industry organizations such as Advocis, Investment Dealers' Association and the Real Estate Network Group;
  - ✓ Business and charity organizations including varied Chambers of Commerce, Victoria Family Self-Sufficiency (FSS) and church groups.
- Taught licensing programs to professionals studying for life insurance, financial planning, and securities examinations.
- Wrote content for *Investigate Before You Invest* investor advisory and financial planner compliance materials for the BC Securities Commission. The organizational principles from this program have become a key methodology for the delivery of financial education in the province of British Columbia.
- Developed and delivered: *ClientMinding*, industry training on client service to members of the Investment Dealers' Association (now Investment Industry Regulatory Organization of Canada);
  - ✓ Sales training and referral programs for the Credit Unions of BC, including 2-day intensive seminars for credit union branch managers;
  - ✓ Coaching and mentorship workshops for the YWCA Young Women's Leadership Development Conference;
  - ✓ *Encouraging Possibilities* workshops, helping people to create a tangible vision for their future;
  - ✓ *An Introduction to Money* class for grade 10 and 11 students for their Career and Personal Planning (CAPP) program; and
  - ✓ *MoneyMinder* personal financial planning tools for the National Association of Professional Organizers (NAPO) to use with their clients.

### **Supporting Financial Literacy with The MoneyMinding Foundation**

Tracy donates a percentage of her earnings to charitable causes. In addition to supporting a number of existing charities, Tracy established The MoneyMinding Foundation: a registered charity that provides financial literacy and empowerment programs for people who otherwise could not access this information. Foundation recipients can be certified on the MoneyMinding programs alongside financial professionals. This initiative enables the unique opportunity to bring non-profit groups serving lower income people together with industry professionals giving both middle market and high net worth individuals access to this valuable program.