

Richard and Susie Peterson host this life changing retreat that will forever shift the way you integrate money into your life.



Richard Peterson is a Professional Certified Coach (PCC) who supports corporate executives and small business entrepreneurs, in creating financial visions and plans that allow for downshifting their careers as they enter the second half of life. His career includes 20 years as the president of companies such as Vail Associates, the primary developer of the Vail Resorts. Richard holds an MBA from Harvard Business School. His passion is helping people navigate life's transitions by discovering what really matters to them, what they truly want in work and life, and then learning to use their resources, including money, to make it happen.

Susie Wise Peterson is a Professional Certified Coach (PCC) and has a passion for working with people who want to live a fulfilled life. She has experience in working with people in education, counseling and coaching. Susie is a life long learner who supports clients in uncovering and following their own transformational path with heart and inner wisdom.

FINDING FINANCIAL FREEDOM RETREAT LOCATIONS

Durango, Colorado Tucson, Arizona
Please visit our website for current retreat dates and pricing.

Retreats begin at 9 am on Friday and end at 1 pm on Sunday.

A 50% deposit is required to secure your place at the retreat. To register, contact Richard or Susie. Payment refund policy is available. Price includes two catered lunches.

We are honored that the Finding Financial Freedom Retreat has been approved for International Coach Federation (ICF) Continuing Education Credits. Please visit our website for the breakdown of categories.

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FINDING FINANCIAL FREEDOM RETREAT

*Discover how
to use money as a
resource to create
the life you want.*

Financial Freedom

Most people's lives are primarily determined by the need for money. Thoughts and conversations are often centered on how much money we need to get all of what we want. From this perspective, our lives are serving the demands of money.

This retreat is designed to turn that process on its head and teach the ground rules for having money serve the demands of our life and what we care about most.

Many of us were never educated in a positive way around money. People are less likely to talk about their financial situation than they are about sex. The Finding Financial Freedom Retreat offers a platform for a new conversation. In a time of unrest and financial challenges, Finding Financial Freedom is an opportunity for participants to come to terms with their own money issues and move forward in their lives from a place of clarity, accountability and responsibility. Financial Freedom addresses inner freedom and challenges limiting perceptions. It offers options to participants and educates them in new ways to handle money. It has less to do with "how much" one has, and more to do with how one embraces their life. The Finding Financial Freedom Retreat provides awareness and action steps around living a life that works.

The process begins by creating a clear view of your actual status of personal finances, using simple tools for understanding the dynamics of money. A "reality check" process invites a detailed look at where your money comes from and where it goes, as well as assess your possessions and investments.

Ever wonder...

How should I use my money?

How can my partner and I be more aligned around money issues?

How much is enough to get me through the second half of life?

How can I protect myself financially and secure my future in these uncertain times?

The Financial Freedom Retreat involves an in depth integration and alignment of what you care about and how to most effectively use money for that purpose. Everyone will look into how their current financial situation reflects or does not reflect what's important to them.

Financial Freedom is the freedom to make life choices without being blocked by money worries. Financial Freedom allows us to live our lives fully and follow our passions without the fear of not having enough.

Summing It Up

On the final day, participants create a "Life Map" that pulls together retreat insights and vision. This is a valuable "take home" tool that participants create to navigate the next few years.

There is also an opportunity to create a personalized financial plan and test various scenarios utilizing a proprietary computerized system.

Some of the areas addressed:

What matters most to you

Your beliefs around money

Cash flow and tax management

Exploring how to align with your calling

Your support network and advisors

Investment strategies and themes

Appropriate use of debt

