



BERT WHITEHEAD

## TESTIMONIALS

“I didn't consider myself financially dysfunctional before I met Bert. His concepts make the financial world comprehensive to me.”

—*Andrew Weil, MD, best-selling author and world-renowned pioneer in integrative medicine*

“In *Facing Financial Dysfunction*, Bert offers profound guidance with simple concepts in understandable language. He helps us examine and change our belief systems, our behavior, and our capacity to accumulate wealth. He is a master teacher, and in this authoritative book he offers the best of what he knows. Read it and prosper.”

—*Robert E. Quinn, author of Deep Change: Discovering the Leader Within*

“Bert's commitment to providing fee-only financial planning to 'real people' has impacted thousands of lives in our country and promises to impact tens of thousands in the future. As a financial advisor and a member of the Alliance of Cambridge Advisors, I can attest to the impact Bert has had on my life, my practice, and my clients' lives. He showed me how and gave me the means to achieve my dream of helping the large group of forgotten middle-income folks while providing sufficient remuneration for myself.”

—*Rebecca R. Preston, CFP*

“You are the genius. Yep, you just keep on providing us all with these great ideas. Also, thanks for the second edition of your book. I finished reading that on the plane ride home and have already implemented some changes in my practice. You certainly know how to simply information for regular type folks. Thanks for being such a wonderful mentor to our Cambridge group.”

—*Kathleen M. Rehl, PhD, CFP*

“Your vision of being the "Henry Ford of fee-only financial planning" is what's always drawn me to you.”

—*Robert J. Schumann, MA, MBA, CFP, EA*

“Bert has been my mentor and has shown me how to build my practice using ethical and cutting edge strategies. He never stagnates. He is innovative with finding new ways in which to enrich the lives of clients and improve their financial well-being. Bert truly is an extremely knowledgeable and insightful leader in the financial world.”

—*Christopher Zehnder, CFP, MBA, EA*



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Bert held the first annual **Family Financial Retreat** in Las Vegas, NV, from January 15-17, 2005. Families participated in financial seminars and were encouraged to talk intimately about money and how it affects their families now and in the future. Children as young as twelve were taught the basics of financial planning and management and prepared wills for their parents. The following participants share their thoughts on this landmark event:

“I thought this was a fantastic conference. I have been talking about it all week. I think the idea of bringing your message to young people is extremely positive.”

- *Robert Pasick Ph.D, University of Michigan*

“Great idea! Help people to do it right the first time!”

- *Marie Howe, parent attendee*

“I just wanted to let you know that I found the family retreat incredibly valuable. I appreciate all the effort you put into planning and preparing for the retreat. And I especially want to thank you for your kindness and for your sincere interest in our future. I feel like I now have a conceptual framework within which to plan my financial portfolio. Thanks again for all your invaluable advice.”

- *Supriya Rajpal, Cambridge Advisor*

“It should *not* be optional. This trip was vital to my education in knowing about money and investments.”

- *Rebecca Gerger, teen attendee*

“I believe this was an excellent idea. The relaxed environment provided a great setting for discussing sensitive issues.”

- *Aditya Rajpal, attendee*