MEDIA KIT

Brent Kessel

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ABACUS

BIOGRAPHY

Brent Kessel

Founder & Financial Advisor

ABACUS WEALTH PARTNERS

Co-founder of Align Impact and

Author of *It's Not About the Money* (HarperCollins)

Nationally acclaimed public speaker and workshop leader, Brent Kessel has presented at MIT, at financial planning industry conferences around the U.S., the Los Angeles Times Investment Strategies conference, leading personal development centers on both coasts, as the keynote speaker for the Yoga Journal conference, and at seminars sponsored by Young President's Organization (YPO). He has appeared on the CBS Early Show, ABC News, and has been quoted in the Wall Street Journal, New York Times, and Los Angeles Times. His book, *It's Not About The Money* (Harper Collins), was named one of Kiplinger's Top Five Business Books of the Year. Brent combines his years of financial planning and impact investing experience along with a deep understanding of the psychological dimensions of money. His audiences are empowered to make significant and lasting changes in their financial lives and in the world around them.

Brent is the co-founder of Abacus Wealth Partners, which provides fee-only, comprehensive financial advice to help individuals and families expand what's possible with money. As an impact investment advisor, Abacus helps clients define their most important social values and financial goals, and then manages all aspects of their financial lives in service of both. Abacus has been a dedicated impact investment advisor for over 20 years, including providing seed funding for the world's first sustainable index mutual funds, and being an early anchor investor in several of the most successful and impactful private equity funds in industry history.

Abacus is a founding B Corp., is carbon-neutral, and donates over 1% of revenue to charity each year.

KEYNOTE

The Eight Financial Archetypes

How Money Psychology Effects the Impact Investor

Most people have strongly-held beliefs when it comes to money. We all go through formative experiences during childhood and early adulthood around money that have led to largely unconscious biases about how we should or shouldn't handle investments, debt, giving, and spending.

After two decades of working with high net worth clients, I defined eight financial archetypes in consultation with a psychologist with forty years of clinical practice. Understanding our dominant and dormant tendencies helps audiences learn:

- Where their biases came from, and how they help or hinder their impact investing goals
- How to create balance so they can make faster, more strategic progress
- What drives their loved ones, and how to best interact with those whose money type(s) seem to be in opposition

This session will point out some of the opportunities and challenges for each archetype within the impact investing framework. These include differences in each money type's:

- Positive intentions
- Painful feelings they're trying to avoid
- Preferred styles of finding and due-diligencing investments or managers
- Preferred format of impact reporting
- Preferred geographies, stages of investment, and if applicable, impact themes

The session concludes with guidance for audience members to help them each create more balance for themselves, and have more efficacy in their impact investing activities.

the caretaker

the innocent

the empire builder

the pleasure seeker

the guardian

the saver

the idealist

the influencer

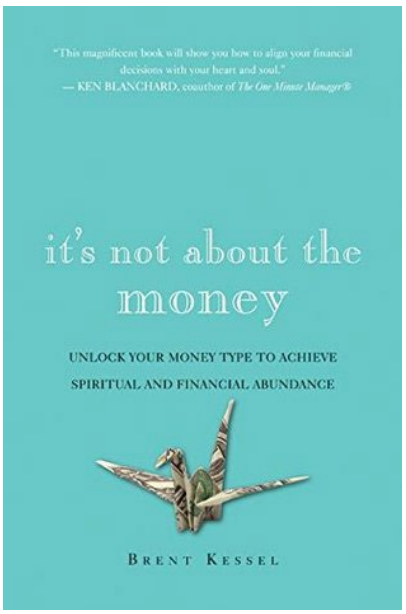
AUTHOR

It's Not About the Money

by Brent Kessel

Discover Your Money Type to Unlock Financial and Spiritual Abundance

Praise for *It's Not About the Money*



"Brent Kessel combines the latest financial thinking with ancient spiritual wisdom to shed light on the relationship between people and their money, and offers the reader a program for attaining financial and emotional security. Drawing on interviews with spiritual leaders and financial gurus, Kessel teaches you how to grow more conscious of your spending, saving, investing, and giving, and shows you how to become more financially sound and spiritually at peace."

—Liz Pulliam Weston, Associated Press

"What's your heart's desire-spiritual fulfillment, or wealth? The good news is that it's not an either/or proposition-you can have both. This magnificent book will show you how to get your ego out of the way so you can align your financial decisions with your heart and soul."

—Ken Blanchard, coauthor of The One Minute Manager®

"The Buddha taught about the dangers of the wanting mind in all of us, and here Brent Kessel applies that wisdom to the modern challenge of people and their emotional relationship with money. All aspects of our lives are interconnected, so ignoring this important relationship usually leads to self-deception and suffering. Applying Eastern Wisdom to a very Western concern, Kessel shows how being mindful of our relationship to money can free one of anxiety and even turn money into a tool for compassion."

—Thich Naht Hanh, Zen Buddhist monk nominated for the Nobel Prize by Dr. Martin Luther King, Jr.

"It's rare that a book on personal finance succeeds equally well on both sides of the coin. Brent Kessel has pulled it off. This is one that's rich in solid, practical advice--but not at the expense of the human spirit."

—Lee Eisenberg, author of The Number: A Completely Different Way to Think About the Rest of Your Life

TESTIMONIALS

"Brent Kessel will change your relationship with money in a way that may also enhance the richness of your life."

—Tom Bradley, President, TD AMERITRADE Institutional

"Brent Kessel is one of the financial planning profession's true thought leaders around what may be the most important issue of our time: How can each of us find personally fulfilling strategies that will lead us toward a life of happiness and spiritual prosperity?"

—Bob Veres
Editor, Inside Information

"Brent Kessel is one of the smartest financial planners I've ever encountered and also the most soulful. Not only does he have the financial acumen to guide even the most sophisticated investor, but he has an unusually deep understanding of the emotional, psychological and spiritual effect of money in our lives."

—Liz Pulliam Weston
Nationally syndicated personal finance columnist, MSN Money expert, and author of Easy Money, Your Credit Score and Deal with Your Debt

"Brent Kessel combines some of the most sophisticated knowledge of financial planning and investment strategies with a sincere and grounded practice in the meditation arts. By reading this book, people will benefit in ways they never imagined possible. I highly recommend his work."

—George Kinder
Author of The Seven Stages of Money Maturity

"Brent Kessel is one of the most thoughtful, thorough and knowledgeable investment professionals that I've met. His advice on blending the personal and financial aspects of life have served him well in doing an outstanding job for his clients."

—Jim O'Shaughnessy
Author, What Works on Wall Street and How to Retire Rich

"Kessel has a unique perspective on money. He is able to open people's eyes to the financial world and at the same time show them how to look inward for value. Anyone who wants to not only be rich but lead a rich life should read this book."

—Thomas M. Kostigen
Dow Jones' MarketWatch columnist and author of New York Times bestseller The Green Book: The Everyday Guide to Saving the Planet One Simple Step at a Time

SPEAKING RESUME

Television and Radio Appearances

ABC News

KTLA Morning News

National Public Radio (NPR)

Sirius Satellite Radio (Jean Schatsky)

Live Events (selected):

MIT "How Money Psychology Effects the Impact Investor"

Impact Advisory Business Models: How to Compare, Evaluate, and Hire

The Yoga Journal Florida Conference (1500 attendees) - Keynote Speaker

Los Angeles Times Investment Strategies Conferences; (two events, 3000 attendees) "Longevity Planning: Making Sure Your Money Lasts As Long as You Do", "Income-Oriented Investing Strategies: Where to Find the Yield You Need with Less Volatility", "Retirement Plan Issues for Public Employees"

YPO Private Wealth Management (two events) - "Your Goals & Objectives: A Departure Point for Determining your Asset Allocation"

Yoga Journal Conferences (five events) – The Business of Yoga presentation: "Money Matters" lecture to yoga studio owners; "The Yoga of Money" workshop

Yoga Works (six events), Santa Monica, CA; "The Yoga of Money - finding peace and awareness in the midst of financial challenges."

Nazrudin Project Conference - "Unconscious Behavior Patterns With Money"

NAPFA Advanced Planners Experience: "The Yoga of Money: Connect Money. Mind.Body," Scottsdale, AZ- a thought-provoking and transformational afternoon exploring how to cultivate inner freedom and financial abundance for your clients and yourself

Financial Planning Association, San Francisco, CA; "Life Planning"

Multi-Day Workshops

Esalen Institute, "The Cure for Money Madness: It's Not About the Money"- with Spencer Sherman

Kripalu Center for Yoga & Health, Lenox, MA (two workshops) – "It's Not About the Money" The Transformational Path to Spiritual Freedom and Financial Abundance -- A weekend workshop to transform your relationship to money.

Seven Stages of Money Maturity, (seven workshops) San Jose, CA & Boston, MA

Esalen Institute, Seven Stages of Money Maturity, Big Sur, CA