MEDIA KIT

Spencer Sherman

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ABACUS

BIOGRAPHY

Spencer Sherman MBA, CFP®

Founder & Financial Advisor

ABACUS WEALTH PARTNERS

Spencer Sherman, MBA, CFP® is the founder of Abacus Wealth Partners, an independent planning and investment firm and founding B-Corp with a mission to *Expand What's Possible With Money*. Spencer brings innovative business, communication, and mindfulness strategies to his employees.

A successful CEO, entrepreneur, public speaker, teacher, and author, Spencer bridges the worlds of mindfulness and money. He skillfully guides audiences, workshop participants, reader and clients to examine intentions, practices, and actions that cultivate a wise relationship with what we value most.

A meditation practitioner for over 35 years, Spencer attributes his compassionate leadership and business success to the daily cultivation of mindfulness. As a teacher, he works with leaders and changemakers to develop their own sense of "enoughness" both personally and professionally.

Spencer holds an MBA in finance from The Wharton School at the University of Pennsylvania. He's the best selling author of *The Cure for Money Madness* and has led workshops at Esalen and Spirit Rock Meditation Center.

He has been practicing mindfulness since 1980 and is a qualified teacher of Mindfulness-Based Stress Reduction (MBSR). He is a Certified Search Inside Yourself (SIY) teacher.

For more information, please visit mindfulspencer.com.

SPEAKING TOPICS

The Dharma of Money: Creating Your Money Karma

What if you were able to let go of aversion, avoidance, and grasping, in order to experience "enough"? This day retreat is a rare opportunity to use the dharma to bring equanimity, joy, and purpose to your financial life. We will dive into the intentions, practices, and actions that cultivate a wise and compassionate relationship with money. Through guided meditations, writing, movement, and group exercises, we will release stressful patterns and cultivate successful strategies to create healthy money karma.

We will form a safe group container to explore what is one of the most challenging areas of life. Many of us have a reactive or confused relationship with money and we assume that's just the way it is. But it doesn't have to be. We can apply Buddhist practices to this aspect of our lives and reveal our authentic path around money. Everyone, regardless of your money situation, is welcome.

The Mindful Advisor

A successful Financial professional has to work closely with their clients' goals, dreams, and fears. How do we help our clients become aware of their long-term habits and behaviors? How do we successfully balance being in the present moment with listening to what our client's are really trying to say to us, all while giving advice for the future?

Join us as we practice:

» Meditation in the Zendo

» Learning how our personal money conditioning can make us a better advisor

» Cultivating skills that create present-minded client and staff experiences

» Maintaining equanimity in the midst of business and personal volatility

» *Can also be given as a presentation

Additional Speaking Topics

The Last Taboo: Shedding Light on Your Relationship to Money

Shedding Light on the Darkest Corner of Our Lives; money is the last taboo and our unhealthy ways around money cause much suffering. This talk is designed to shift our money behavior from reactivity to wisdom and ease.

Financial Intimacy & Harmony for Couples

Learn powerful tools to communicate openly around money and make your relationship more harmonious, honest, and successful by doing so.

Mindfulness Secrets from Google

Integrating Mindfulness into your Financial Wellbeing

SPEAKING TOPICS

The Mindful Advisor

2018 Retreat Overview

It's a beautiful, unseasonably warm day in February on the Northern Coast of California. The sun is shining where the Pacific Ocean meets the headlands of Marin County and the organic farms of the Green Gulch Farm and Zen Center.

I am here the day before the retreat, walking along the sand with some fellow financial advisors who have also decided to come early. We watch as a man leads his llama and two small dogs down the shoreline. We take in the beautiful scenery.

The next day, 25 financial advisors from throughout the Bay Area will attend the second annual Mindful Advisor retreat. Usually, these financial advisors attend crowded conferences at corporate hotels. But on this day, they've been inspired to spend time practicing mindfulness and carving out a whole day to grow their business by learning practices that cultivate spaciousness!

As they arrive, they are greeted with a slower pace as they become aware of the ocean, the smell of eucalyptus, the sounds of the Pacific loons and meditation bells.

The motivation for attending has little to do with escape from the stress of their businesses or lives. When we share why each of us is here, a consistent answer is to seek tools for becoming a better advisor to clients. One woman said: "I want to learn to listen and speak in a way that helps my clients transform their lives."

At 10 a.m. we enter the meditation hall, known as the Zendo, to learn how to stare at an empty wall, put our attention on our breath, and not pursue the habitual thoughts of the mind. It sounds simple enough. In fact, on the surface it seems simpler and easier than doing cash flow projections back at the office. But as many discover, what may be simple, is not easy. This meditation training is designed to help cultivate a more focused and less reactive mind. We trust that training the mind will make us better advisors. With this kind of mind, we improve our focus and gain the ability to listen to the wisdom of our clients rather than to just give advice. We are also less reactive to the markets!

After lunch, we use mindfulness to take a look at our challenges as advisors. One advisor shares how difficult it is to keep clients invested when the markets are crashing. As we dig deeper, we realize that the self-talk around a market correction is more problematic than the decrease itself. He catches himself thinking, "Maybe it is possible to time the markets even though there's no evidence. Maybe I should be in a different profession. Maybe I'm not good enough. If I don't change my clients' portfolios and stop the bleeding, they are all going to leave me."

Every negative interaction in life produces some suffering, but we all tend to add on to our experience of the event with thoughts and internal chatter. These secondary thoughts are often more harmful than the event itself.

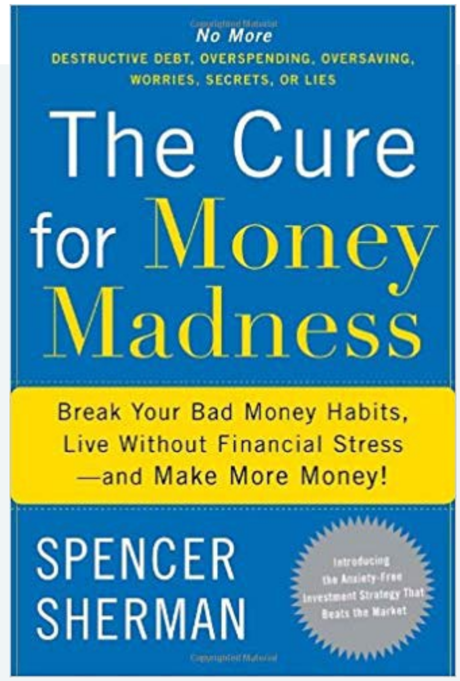
We end the day with a hike to the beach accompanied by the awareness that we are walking, listening and speaking more mindfully. We step forward with an openness to the present moment. There's an exciting mystery to living this way. We resolve to commit to these practices so that our client interactions will be fresh, alive, creative, and full of possibility.

AUTHOR

The Cure for Money Madness

Break Your Bad Money Habits, Live Without Financial Stress--and Make More Money

by Spencer Sherman



The Cure for Money Madness makes a golden promise: stress-free prosperity and a lifetime of financial peace.

When financial advisor Spencer Sherman found himself crossing a police line to retrieve his work files from a burning office building, he realized he had money madness. He noticed it in his clients, too: those irrational feelings about money that make otherwise rational adults behave foolishly—buying high, selling low, overspending, lying to their spouses, equating their self-worth with their net worth. Money madness stresses us out, poisons our relationships, and keeps us from making as much money as we can. So Spencer invented the cure. Now, in *The Cure for Money Madness*, he gives us the tools that have helped thousands of people find greater peace of mind—and make more money.

Money madness, Spencer shows us, comes from unproductive messages that we received long ago. “It takes money to make money.” “Paying rent is just throwing money down the drain.” “Don’t talk about money.” When you challenge the messages, you can transform all aspects of your money life: earning, spending, saving, investing, giving, borrowing. More money will flow to you. Your relationships will improve. You’ll enjoy your money more. And you’ll be more generous, too.

In *The Cure for Money Madness*, you’ll discover:

» How much your money madness has been costing you

» How wealthy you truly are, by using the revolutionary Actual Net Worth™ statement

» How “small and boring” can help you outperform the top investors—without watching the market

» How to communicate about money in ways that create deeper connections with your spouse, parents, children, friends, and colleagues

» How to know what is truly enough

Money madness keeps us from living as richly as we might and enjoying the wealth we have. In these tough economic times, *The Cure for Money Madness* transforms fear and stress into prosperity and peace.

BOOK REVIEWS

"An excellent book that teaches you how to have a 'healthy' respect for money."

—Robert G. Allen, The One Minute Millionaire and Nothing Down

"Part basic sanity, part good financial advice, *The Cure for Money Madness* shows how gaining perspective on your finances makes your life richer—and maybe even makes you more money. Spencer Sherman shows you how to have the cake you really want—and savor it as you eat it too."

—Vicki Robin
Coauthor of Your Money or Your Life

"We all want to do the right thing with our money—make it grow, spend it wisely, and use it to make the world a better place. But something is stopping us from doing that, and Spencer Sherman has a name for it: 'money madness.' Whether your madness is debt, overspending, taking too much risk, or ignoring your finances altogether, there's a cure to be found in this book."

—David Bach
Go Green, Live Rich and The Automatic Millionaire

"In these difficult financial times, The Cure for Money Madness offers sanity, clarity, and truly helpful understanding to calm the heart and regain a wise perspective."

—Jack Kornfield
A Path with Heart and founder of Spirit Rock Meditation Center

"You would be crazy not to read this book, cure your money madness, and make more money in every area of your life."

—Mark Victor Hansen
Editor of Chicken Soup for the Soul

"Read this book to learn how to prioritize your household spending and spend less of your precious time worrying about how to invest your wealth. The benefits will improve both your financial and your personal balance sheets."

—Howard Kaufold, Ph.D.
Director, MBA Program for Executives, The Wharton School, University of Pennsylvania

SPEAKING RESUME

Previous Speaking Engagements

» **The Mindful Advisor**
Green Gulch Farm Zen Center

» **The Dharma of Money**
Spirit Rock

» **Kripalu**
Center for Yoga & Health

» **Esalen**

» **FPA** of San Francisco

As Seen In