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Item Type	Article
Authors	Gillen, Martie
Citation	Gillen, M. (2016). Practitioner Profile: An Interview with Beth Crittenden. <i>Journal of Financial Therapy</i> , 7 (2) 6. https://doi.org/10.4148/1944-9771.1139
Download date	2026-04-26 22:54:11
Link to Item	https://dspace7-entities.atmire.com/xmlui/handle/123456789/262

December 2016

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Recommended Citation

Gillen, M. (2016). Practitioner Profile: An Interview with Beth Crittenden. *Journal of Financial Therapy*, 7 (2) 6. <https://doi.org/10.4148/1944-9771.1139>

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Practitioner Profile

An Interview with Beth Crittenden

Beth Crittenden offers financial wellness coaching to people who want growth both professionally and personally. Beth has been working with finances as a focus since 2009, after training in somatic psychology, healthy communication in relationship, and mindful meditation practices and theory.

Words that clients use to describe Beth's approach: detail-oriented, non-judgmental, heartfelt, clarifying, informative, compassionate, spiritually-focused, fun, and kind.

Beth's professional sweet spot is working with folks who serve in a helping and/or creative capacity. She has previous career experience as a massage therapist, home organizer, clinic manager, development associate for education and domestic violence prevention, and draws on those experiences for how it can feel to need to manage finances during challenging feelings.

Visit www.financialwellness.coach to learn more.



Q. Define what you do professionally.

A. I combine my coaching, counseling, and consulting skills to help individuals, couples, and small business owners live in clarity and good health in the realm of their finances.

Q. What activities encompass your professional responsibilities?

A. My professional responsibilities include:

- updating and keeping reconciled tracking systems such as QuickBooks, YNAB, xero.com, Google Sheets, and FreshBooks.com

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- guiding clients through written and verbal goal-setting and project planning for their finances
- guiding clients through role-playing exercises to increase their ease and confidence in talking about financial topics
- helping clients strategize around what financial items they need to take care of, when, and how
- serving as an accountability partner to ensure people are reaching their goals
- working through family systems information and addressing imbalances and resentments that may exist when it comes to financial matters
- consulting about estimated income taxes and prepping clients' tax organizers for their accountants
- guiding clients through getting their financial affairs in order, whether it be working with an investment advisor or attorney, to finalize a will or trust

Q. How long have you been engaged in your professional activity?

A. In the realm of finances, it has been since 2011. In the realm of counseling and coaching in general, it's been since 2005.

Q. What led you to your professional calling?

A. I was lucky enough to be chosen by a patient, kind, and funny mentor, who had been trained by Dave Ramsey. He provided a wonderful path for me to grow in my confidence that I can indeed do this work professionally.

Q. How are you compensated?

A. I have a couple of different hourly rates, depending on the nature of the work.

Q. Do you work alone or do you have a team? Please explain.

A. I work alone with each client. I am also grateful to have found some key referral partners, with whom I also occasionally consult.

Q. What theoretical framework guides your work when dealing with clients?

A. I utilize Dave Ramsey's "baby steps" when debt and/or disorganization are present. I also use Al-Anon and 12-step principles when boundary and family issues are present.

Q. What needs to happen so that ten years from now we can say that financial therapy is a respected field of study?

A. I think rebranding the look and feel online to be more modernized and accessible would help.

Q. What benefits can the Financial Therapy Association provide to others doing work that is similar to your professional activities?

A. The research studies in the Journal of Financial Therapy are tremendously helpful. Highlighting those articles and hosting some online discussion would be a wonderful way to keep learning.

Q. If others are interested in finding out more about you personally and professionally, where can they obtain this information?

A. Visit my website at <http://www.financialwellness.coach> or connect on LinkedIn at <https://www.linkedin.com/in/bethcrittenden>