

## BIOGRAPHY - Amy S. D'Aprix, MSW, PhD, CPCA



Dr. Amy D'Aprix is a life transitions expert and an internationally renowned authority on lifestyle issues relating to retirement, estate planning, aging, caregiving, and family dynamics. "Dr, Amy", as she is affectionately known, has worked with the financial services industry for more than twenty years, both with advisors and as a keynote speaker at client events.

Dr. Amy teaches and coaches advisors to help them have deeper, more authentic relationships with their clients. She helps them better understand and respond to the emotional, family, and practical implications of life transitions and then shows them how to tie those back to financial or legal implications, thus making financial planning and estate planning more relevant and imperative for clients. She is known for her ability to empower advisors with communication tools that authentically fit their style and can be utilized immediately.

She has also recorded several podcasts for advisors on Money Mindset: A Podcast Miniseries for Financial Advisors. (<http://bmmogamviewpoints.com>) These include: Family Conversations that Should Not Be Avoided, Suddenly Single, and Helping Clients Determine Who will be their Caregiver.

In client events, across North America, Dr. Amy speaks about: the non-financial aspects of retirement; conversations families need to have during estate planning; the emotional, family, practical, and financial implications of caregiving; how women can improve their relationship with money; and how to thrive during life transitions. She is known for her warmth and humour and for her practical approach to many of life's challenging transitions. She motivates her audience to take action on their financial and life planning.

Financial results from these events have been extensively tracked and measured and were found to provide significant growth in assets under management; both through increase in share of wallet with existing clients and conversion of prospects to clients.

She has authored the book *From Surviving to Thriving: Transforming Your Caregiving Journey*, and co-recorded a CD with an accompanying workbook: *Building the Bonds of Friendship in Midlife and Beyond*. She is also the creator of the *Life Memories Journal* and *Caring Cards* to inspire more meaningful intergenerational conversations. Dr. Amy is a frequent guest on radio and TV shows and has written numerous articles for print and online publications.

She sits on the Board of Directors of the International Federation on Ageing, and is the Past President. In October of 2016 she received a Professional Achievement Award from her Alma Mater, Case Western Reserve University. And in March 2012 she was recognized as one of Canada's top business women by Women's Post Media.

Dr. Amy holds an MSW, Ph.D. and the designation of Certified Professional Consultant on Aging

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