



Kelly Trevethan of United Capital of San Francisco Launches New Financial Planning Tool

San Francisco, April 6, 2011 – [Kelly Trevethan](#) CIMA™ CBC, the Managing Director of United Capital of San Francisco, a Division of [United Capital Financial Advisers, LLC](#), one of the nation's fastest growing wealth management firms, has released a new tool to encourage financial discussions for couples. *Honest Conversations*™ uses a color-coded deck of cards in an interactive exercise, which helps increase the knowledge and understanding of the financial wants and needs of the parties in a relationship.

“Discussing money matters can be stressful,” says Trevethan. “United Capital wants to help alleviate some of that anxiety by opening up the conversation in a positive and constructive way. In this tense economic climate, it is more important than ever to be open with your significant other about your financial views.”

Honest Conversations™ allows couples to express their attitudes and to discover each other's objectives regarding finances and investments in an interesting and non-threatening way. As they go through the cards, they have a better understanding of each person's relationship to money and investing.

“After recording their views,” describes Trevethan, “we compare the rankings of each individual and evaluate the outcome. This allows us to determine a financial strategy that is best for the couple and an investment plan that will achieve the financial needs and wants revealed throughout in the exercise. Our goal is to get people talking about the importance of securing their financial future together. Then we can devise an investment plan that is suitable for each of them, which may not be obvious if they haven't discussed these issues.”

Founded in 1995, The Trevethan Group of private wealth advisers joined United Capital Financial Advisers in 2008. Now known as United Capital of San Francisco, Trevethan's group is a private wealth counseling office located in the heart of San Francisco's Financial Center. The regional office offers a wide range of services including investment counseling, estate planning, 401(k) and 403(b) retirement plan design, financial education and employee communications.

United Capital Financial Advisers, LLC, is one of the fastest growing national partnerships of 29 private wealth counseling offices, which provide advice on over \$13 billion of client assets under advisement.

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