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How a wealth manager uses energy psychology

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By [Lou Carlozo](#)

(Reuters) - Energy psychology combines Eastern approaches to mind, body and spirit with Western psychology and psychotherapy, delving into unconscious and subconscious patterns that go back to childhood. So what exactly does that have to do with building wealth and managing your portfolio?

Plenty, says Julie Murphy Casserly, a wealth manager in Chicago who manages about \$100 million in assets and is a proponent of a very alternative investing strategy.

If you use energy psychology to probe your habits and beliefs surrounding money, you can uncover destructive patterns that cause you financial grief, she says. After all, what good are high rates of return if you have the ingrained habits of a control freak or compulsive debtor?

Casserly recommends energy psychology for her clients when she's up against behaviors and beliefs that a simple uptick in the market won't cure. "It is never, ever about the money or the numbers when there is a conflict between adviser and the client," she says. "It's something beneath the numbers."

Here's how it works: Unlike conventional psychology, which takes lots of time and talk, energy psychologists try to pinpoint a client's problems in as little as one or two hours. They ask lots of questions to probe your unconscious for negative beliefs you may have embraced in childhood: "You can't trust anyone with your money," for example, or "You'll always have to work hard to survive."

The sessions can get downright mystical. Some energy psychologists claim to connect with a higher consciousness to find a client's "ancestral patterning": destructive beliefs that have existed in a person's clan for generations.

It can also involve "holographic repatterning," or "resonance repatterning." Developed by Chloe Wordsworth, who holds a master's degree in English from UCLA, it posits that our physical bodies are literally energy frequencies that go haywire when our needs go unmet. Therapists use "muscle checking" -- a process of testing a person's limbs for unusual resistance in response to a question or statement -- to tell if your body-mind energy frequencies are "in tune" or not.

Casserly, who operates her own firm, JMC Wealth Management, says about one third of her clients are engaged in energy psychology. "If something bad is going on in your personal life or your spiritual life, it often manifests itself in the money," she notes. "When we act out, we tend to do it with food, or we do it with our financial behavior."

In Casserly's practice, she'll send a client to an energy psychologist and then ask what the sessions revealed. Using that information, she helps them make behavioral and even investment decisions to improve their bottom line.

Casserly cites a female business owner client who was "wound up really tight" and "trying to control everything her employees were doing." Energy psychologist sessions caused the woman to recall that as a child, she ran her dysfunctional household because her parents let things go.

"If she didn't try to keep it all together, she wouldn't have survived," Casserly says. "But when you do this work, you discover that what worked as a child no longer serves you as an adult."

Thus enlightened, the client gave up micromanaging Casserly's investment choices and loosened up on the business front. As her portfolio has grown, "She has also gone from \$250,000 in revenue and two employees to more than \$1 million and six employees," Casserly says.

Of course, you won't find any of this in the finance textbooks at Wharton or the London School of Economics. It's more in the realm of spiritual retreats or vision quests, which may explain why Casserly invokes hippie parlance in going public.

"Now that I've decided to let my freak flag fly" she says, "I've noticed that a lot more people are willing to talk to me about it, and tell me that they're doing it, too."

HOW SHE GOT STARTED

Casserly first consulted an energy healer 10 years ago, mired in endless toil without getting ahead. The sessions revealed her own workaholicism, and that "this pattern went back in my father's family (for) eight generations," she says.

Shortly afterwards, Casserly experienced breakthroughs. She wrote a book, "The Emotion Behind Money," saw her business take off, and cautiously began to share energy-psychology themes with select clients.

She also brought the woman she'd consulted, Anne Emerson of Sedona, Arizona, to her office for a few days of energy sessions with JMC clients

"I had to add three days and double her time here because of the high demand," Casserly says. "I never would've thought that this is what people are starving for."

Emerson says money is a common theme in her therapy sessions.

"I work with some people who are absolutely rich and live in spiritual poverty; they've got to make more, they've got to make more, because there's never enough to fill that hole," Emerson says. "The principles of wealth are different from having money, and most people are not wired up to get that."

Indeed, Emerson is a walking advertisement for fiscal prudence. "I own my house outright with no debt and if I can't afford something, I look at how much I'll have to sacrifice in the future to pay for it now," she says. "Credit cards? I pay them off every month." Casserly also has other energy psychologists she recommends who work more like life coaches. And the theme seems to be going down well with some.

One of Casserly's longtime clients is Sharon Doyle, 43, of Evanston, a Chicago suburb. Says Doyle: "I always found stuff like alternative therapies fun. I love acupuncture, and I'm into psychic stuff. But seeing Julie and what a positive effect it had on her, that was the best recommendation."

Doyle saw the energy psychologist after lamenting to Casserly about a cycle of stress and sleeplessness regarding money. Self-employed in operations and marketing, Doyle says her cash flow often resembles a rollercoaster.

This was entwined with anxiety over getting pregnant; a doctor had just told Doyle and her husband they'd need in-vitro sessions costing \$30,000.

Doyle instead tried a few \$150 energy psychology sessions with Emerson via phone. That work, she says, revealed her unconscious need for control and discipline, coming from her father's side. She worked to let go, and less than four months later she got pregnant without any in-vitro. (She is currently expecting her second child.) Her finances are much better, too, and not merely because she saved \$30,000.

But the approach doesn't sit well with all investors.

"I have had clients look at me strange," Casserly acknowledges, "and have had people just not do it."

"There may be a place in a person's life for 'energy healing,'" says Kevin Lynch, an assistant professor of insurance at The American College in Bryn Mawr, Pennsylvania. "But as a licensed financial adviser, I recommend you restrict your recommendations to quality energy stocks, bonds and other financial instruments."

"We're clearly in the camp of using time-tested methods of planning and investing," says Neal Price, a principal with Strategic Wealth Partners in Deerfield, Illinois. "That's not to say that we don't think outside the box, or (that we) ignore the psychological and emotional side of investing -- but at the end of the day, we don't believe you can solve someone's complex financial problems with a little pixie dust and hocus-pocus."

Casserly has heard such objections before. In the male-dominated, button-down world of financial planning, she doesn't expect that most men will get or embrace the practice - which she sees as a way of supplementing sound investment strategy with intuitive tools.

"I know numerous financial planners -- particularly female ones -- who say, 'I see those energy psychologists, but I don't dare tell my clients about it.'" She is quick to add that in Chicago's North Shore suburbs, where some of the Midwest's richest denizens live, "Everyone does it. But no one talks about it."

Yet if going public with her unconventional methods comes at some risk to her business reputation, Casserly doesn't seem the least bit fazed.

She says, "I just have to have the courage to do something outside the box if I think it's going to help people."

(Editing by Beth Pinsker Gladstone and Andrea Evans)

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