

# ACTIVATE YOUR MONEY

## MEANING OF MONEY TOOLKIT

The exercises in this toolkit are intended to bring more nuance and reflection to your financial archetypes and money stories. You can engage in this process on your own, with friends, or as part of an investment club.

### Exercise One: Money Checklist

Start by checking any of the following items that apply to you. Although you might feel that all of these responses apply to you, try to prioritize your top 5 to 10 responses. Feel into what resonates most deeply and viscerally with you.

#### For me, having mean means:

- Being loved
- Ability to relax and not worry, feeling safe
- Being nurtured, taken care of
- Not being stuck
- Feeling respected
- Being able to plan and dream
- Being acceptable as I am
- Having someone else's trust and admiration
- Choice to create the work and life I want
- Being able to do what I really want/like
- Independence, not having to rely on anyone else
- Responsibility
- Being strong and healthy
- Being smart
- Being sexy
- Ability to be generous, to share with my family and friends
- Ability to help people less fortunate, save our planet, or other things I care about
- Security in my old age
- Owning beautiful things
- Ability to buy beautiful and luxurious things for others
- Avoiding drudgery
- Freedom from oppression or tyranny
- Honoring the legacy of my ancestors
- Learning new things, new skills
- Travel and adventures
- Mattering in the world, being important
- Ability to keep my children safe and give them a strong start in life
- Leaving a legacy for other people, like my kids
- Being healthy and leading a long active life
- Having the things my parents never had
- Taking care of those I love

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- \_\_\_ Being allowed into exclusive clubs or communities
- \_\_\_ A way to measure my success
- \_\_\_ Being/becoming an adult
- \_\_\_ A responsibility that I don't want
- \_\_\_ Something I have to worry about
- \_\_\_ A job for someone else
- \_\_\_ A destination
- \_\_\_ A journey
- \_\_\_ A reward
- \_\_\_ A responsibility that I don't want
- \_\_\_ A game of acquisition and building wealth at which I want to succeed
- \_\_\_ Something hidden/private, not to be talked about openly
- \_\_\_ A burden that I have to carry, I don't really want money.
- \_\_\_ An evil, good people don't have money
- \_\_\_ A vice of society
- \_\_\_ Being able to be truly lazy
- \_\_\_ Ability to support my vices and bad habits
- \_\_\_ Enabling everything to be in perfect order
- \_\_\_ Opportunity to get an education
- \_\_\_ Knowing my worth beyond looks and my body
- \_\_\_ Having a sense of control in my life
- \_\_\_ A ticket to fame

Once you have completed the exercise, spend a little time reflecting on your responses.

1. Why do you think the items you selected stand out for you? Were there any choices that resulted in a really strong reaction? What does that tell you?
2. Are your choices more reflective of your past, present, or future money stories? How do they relate to your financial archetypes, assuming you took the [Financial Archetype Quiz](#)?
3. Are you happy with your current feelings about money? If not, how would you like to change your view about money going forward? What would you need to do to create that change?
4. If you did this exercise with others, spend a little time reflecting on common themes or feelings. Why do you think they arose? And, if there were few commonalities, what do you think that was about?

### Exercise Two: Visioning

Find a quiet place and time to sit down with a pen, paper – or your computer. Imagine

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your ideal scenario related to money. What would it look like? How would you feel? What would you be doing in the world? Go into as much detail as you can, writing full sentences. As you are writing, don't edit yourself. Just write until you have nothing else to say. When you are finished, put your writing away and come back to it a few weeks later. Does it still resonate? Are you ready to take some steps to make that vision a reality?

5. How would you like money to look in your family and/or relationship?

### Exercise Three: Watching Yourself

The best way to really understand your unique approach to your money is to slow it down and notice. This means inviting more awareness and listening to the thoughts and feelings that arise when you interact with money. At its core, your money is shaped and defined by how you think about it.

As you go about your day, you can take just a few seconds to observe yourself with pure curiosity and no judgement when you interact with money - moments when you:

- Pay a bill
- Think about your income and earning history
- Are presented with a new opportunity that has a price tag
- Have a conversation with a loved one about a decision with a financial component
- Consider the taxes you pay
- Have the option to give a gratuity
- Are sharing expenses over a dinner or other event

You might believe that we know our thoughts and beliefs about money. However, when you are actually in the moment and have to make a financial decision, you might be motivated by, or acting from, a very different set of thoughts or beliefs. The only way to know what is really driving you is to pay attention. The insights you obtain through this practice could change your money mindset and your money story.