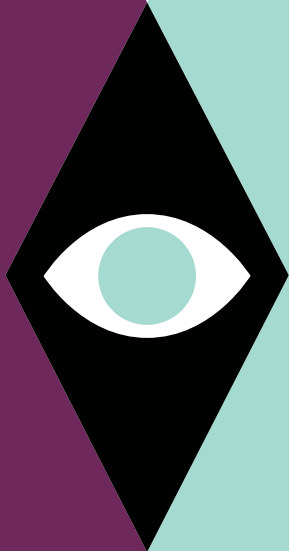


MONEY STORIES

How can we discover and rewrite our money stories, in order to nourish our individual and collective wellbeing?



From the team at

**MODERNIST[®]
FINANCIAL**

Friends,

At Modernist, we help our clients structure their wealth around their values, in part by making space to discover our money stories.

Since 2017, we've been gathering for MODERNIST MONEY STORIES, an event series to do this essential work in small groups.

Now, we've created a DIY version of that event series.

We invite you to use this tool to host deeper conversations about what money means to you with the people you love.

Enjoy,

Georgia + Team Modernist.

HOW TO USE THIS TOOL TO UNDERSTAND YOUR MONEY STORY:

Invite a friend(s) or loved one(s) to join you in this conversation.

Set aside a specific time in a quiet space without distractions. Maybe during a meal, with drinks, in a park, or online...

Make sure each participant has a copy of this guide and a writing utensil.



When you see this symbol, the text is meant to be read aloud. You can take turns or nominate a reader.

IT ALL STARTS WITH YOUR STORY.



Most of us aren't aware of how our inherited money stories drive our financial decisions and behaviors.

This tool invites us to bring our inherited money stories to light, so we can craft a story that supports our daily actions, our individual well-being, and the greater community.

Our question today is:

How can we discover and rewrite our money stories, in order to nourish our individual and collective wellbeing?

We're not expecting an answer today, but instead, hope to understand the question more fully.

So, let's get started.

First, let's take one minute to sit in silence together. Take a few deep breaths. Feel the ground supporting you.





Fertile conversations involve shared principles and agreements. Let's embrace these in our conversation by taking turns reading these aloud.

PRINCIPLES

This is an all leader group

Responsibility is shared for the quality of the experience

Our purpose is to seek connection and understanding

AGREEMENTS

Hold confidentiality

Listen with attention, compassion, and curiosity

Honor the personal choice to speak or not

Speak with intention

Remain aware of the impact of your contributions

Resist the urge to interrupt

Share stories, avoid advice


Relish our differences

NOW, PLEASE LIST 10 WORD OR PHRASES THAT COME TO MIND ABOUT MONEY



Let's share a few of our words aloud with each other.
Are any of our words surprising?

PERSONAL INSIGHTS ABOUT MONEY

 Look for clues in your past that will help you to understand your current financial life. Starting with your childhood, what experiences have shaped your underlying beliefs and attitudes about money? What do your patterns of earning, saving, investing, and giving tell about you?

Take five minutes to write down the first things that come to mind for you.

As a child, my mother (or guardian) taught me that money...

As a child, my father (or guardian) taught me that money...

The first time that I earned money, I felt...

In my youth, my biggest concern about money was...

Today, my biggest concern around money is...

For me, talking about money is most difficult when...

In my financial life, I'm most satisfied when...

In a couple of sentences, how would you describe the most active aspects of your Money Story until now?



Let's share what we wrote.

Think of someone you can look to as a role model for financial well-being and/or satisfaction. They can be real or fictional, past or present. What factors contributed to that person's "success"?



Let's share what we wrote.

Imagine you have all the resources you need, what money story do you want to tell yourself and the world going forward?

What needs to shift (as one small step) to get you closer to this new story?



Let's share what we wrote.

List at least one thing you heard that you appreciated in this conversation.

List a few ways you could continue exploring these questions and ideas with yourself and your various communities?



Let's share what we wrote.

THANK YOU

For making the time to dig into your Money Story.
At Modernist, we believe reflection is essential to
informing values-focused decisions.

Please help us spread this tool!
You can find a PDF to download at modernistfinancial.com
We're also happy to mail a copy to someone you know,
just drop us a line at hello@modernistfinancial.com

WE'RE HERE TO HELP

MODERNIST UNIVERSITY

We offer a variety of resources for our clients and community, including investment insights, our free Money Toolkit, a lively blog, and more about Money Stories.

RESOURCES + REFERRALS

We've compiled a list of resources, organizations, podcasts, and books we find helpful for digging deeper into your relationship with money. You'll also find a directory of recommended money coaches, financial planners, and financial therapists.

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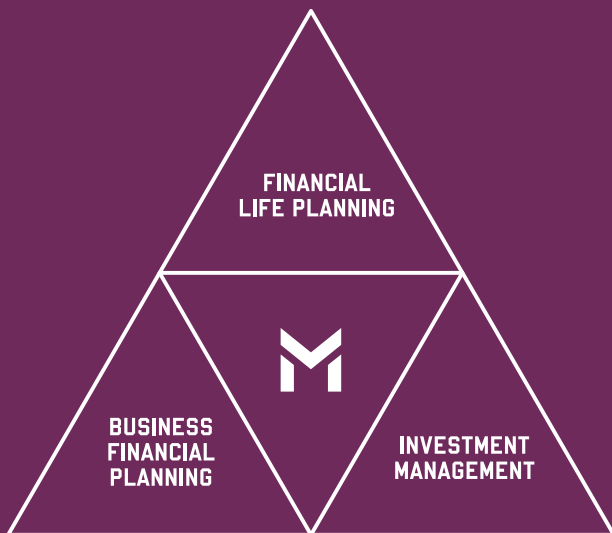
WE'RE BUILDING A NEW MONEY CONSCIOUSNESS.

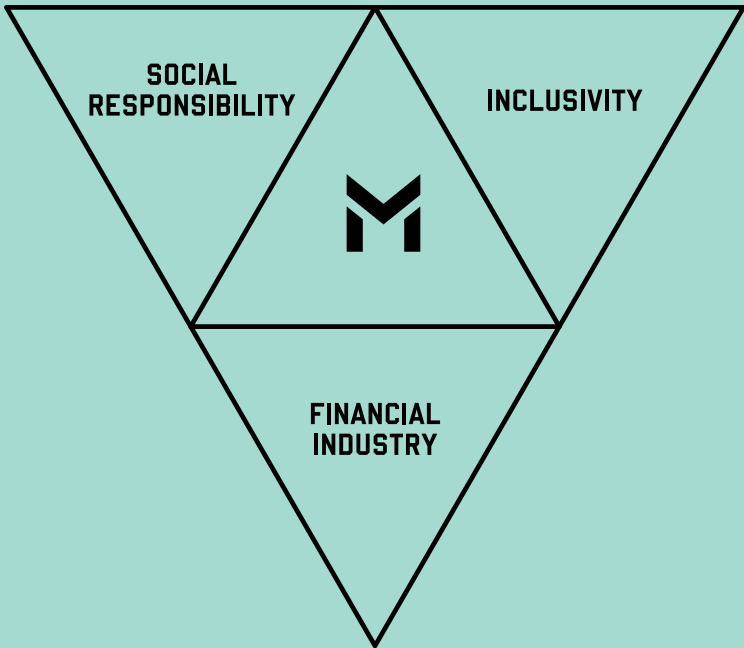
Modernist Financial is a wealth management firm that helps progressive people structure their wealth around their values. They come to Modernist because they want to work with a firm that reflects their values and shares their creative spirit.

SCHEDULE A FIT CALL

Modernist clients are those who have inherited or retired, or successful founders preparing for a business sale. If this sounds like you or someone you know, we'd love to talk!

Reach out to us at hello@modernistfinancial.com





WE WALK OUR TALK

B Corp. Fee Only. Fiduciary.