

Money Messages

Purpose

Despite what economic class we grew up in, “money” is one of the most deeply ingrained concepts, one that we are taught is taboo to discuss, and one that is complicated to unpack in a family setting. We will begin to identify our own money messages and become aware of how that lens informs and influences our advising. What skills can we use to prepare for this? How can we help the systems in which we work when issues of money play out across the generations?

Objectives

- To identify our own assumptions about money and wealth
- To investigate how those assumptions about money drive behavior
- To discover how these assumptions will come up – and with whom – during your advising
- To learn how to use this exercise and awareness within your respective system



Facilitation Observations