



## What's your Money Story?

Your Money Story shapes your financial reality. It's your personal beliefs and experiences around money. It influences how you perceive, interact with, and manage money.

**To learn more about your Money Story, ask yourself:**

- **What lessons about money did you absorb during childhood?**
- **How does money make you feel?**
- **What does being rich mean to you?**

Financial freedom is rooted in self-worth and mindset. True financial freedom is more about your relationship with money and your sense of self-worth than the amount of money you have.

When you become aware of your habits and align them with your true values, you can redefine what wealth means to you and create a life of financial abundance!

## What's your Money Style?

Your natural Money Style shapes how you think about and manage money. Your Money Style has strengths and weaknesses. It's part of your behavioral DNA and influences your financial habits, but it also has a shadow side that can create barriers to success when overplayed or misaligned with your priorities.

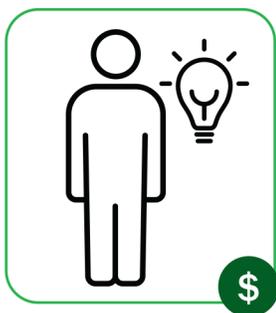
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**Check out the four Money Styles. Which one are you?**

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**THE DIRECTOR**



**THE ENERGIZER**



**THE SHEPHERD**



**THE ANALYZER**



## THE DIRECTOR

### WHAT MAKES YOU STAND OUT?

- **Action-Oriented:** You don't wait around; you make things happen.
- **Focused on Results:** If it doesn't move the needle, it's not worth your time.
- **Cool Under Pressure:** Challenges don't shake you; they motivate you.
- **Decisive/Direct:** You make the tough calls and keep things moving.
- **Big-Picture Thinker:** You don't just think outside the box—you break the box entirely.

### THE SHADOW SIDE: THE DICTATOR

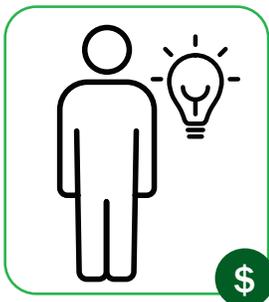
Your drive is your superpower—but when overdone, it can become a weakness. Pushing too hard without considering others can turn you into The Dictator—someone who values results over relationships and moves so fast that important details (and people) get left behind.

### SIGNS YOU'RE SLIPPING INTO YOUR SHADOW STYLE:

- **Dismisses Input:** “No one asked what you think.”
- **Avoid Details:** “I can't be bothered to check that.”
- **Over-commits:** “Yes, we can do it by then!”
- **Sacrifices Work-Life Balance:** “I'm too busy to take a break.”
- **Gets Impatient:** “I should have had a return by now.”

### THINGS YOU PROBABLY SAY:

“What are we waiting for?”  
“Show me the money!”  
“This isn't working. We need to pivot.”  
“No need to panic. I've got this.”  
“Let's get busy!”



## THE ENERGIZER

### WHAT MAKES YOU STAND OUT?

- **High-Energy/Charismatic:** You bring the spark that gets people excited.
- **Optimistic/Fearless:** You believe things will work out—even if the details aren't clear yet.
- **Loves New Opportunities:** If something sounds fun and full of potential, you're in.
- **Spontaneous/Flexible:** You don't need a strict plan; you trust your instincts.
- **Big Thinker:** Small steps bore you. You're here to go big or go home.

### THE SHADOW SIDE: THE ECCENTRIC

Your energy is contagious—but when overdone, it can turn into chaos. When you slip into your Eccentric side, you may avoid structure, struggle with follow-through, and rely too much on luck instead of strategy.

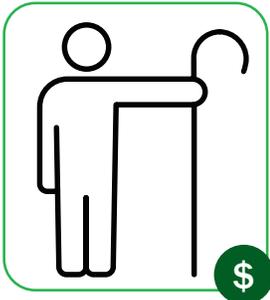
### SIGNS YOU'RE SLIPPING INTO YOUR SHADOW STYLE:

- **Seeks Constant Approval:** “Yes, but do you like it?”
- **Overly Optimistic:** “I'm sure it will all work out somehow.”
- **Disorganized:** “When was I supposed to file that?”
- **Gets Emotional Over Money:** “Money stuff makes me so upset!”
- **Unprepared but Confident:** “Well, I thought I had it all figured out.”

### THINGS YOU PROBABLY SAY:

“I'm excited about the possibilities!”  
“When one door closes, another opens.”  
“There are a lot of things we could do.”  
“No plan? No problem.”  
“Let's dream a little, shall we?”

**When you combine your natural excitement with just enough structure, you become a powerhouse—someone who not only dreams big but actually makes those dreams happen.**



## THE SHEPHERD

### WHAT MAKES YOU STAND OUT?

- **Team-Oriented/Supportive:** You value cooperation and make sure everyone feels included.
- **Patient/Steady:** You're not in a rush; good things take time.
- **Practical/Thoughtful:** You consider how each decision affects people, not just the numbers.
- **Prefers Predictability:** You like to stick to what works rather than take big risks.
- **Calm/Conflict-Averse:** You keep the peace, even when tensions run high.

### THE SHADOW SIDE: THE DOORMAT

Your kindness is your strength, but when overdone, it can turn into self-sacrifice. When you slip into your Doormat side, you may struggle to speak up for yourself, hesitate to make necessary changes, or let others take advantage of your generosity.

### SIGNS YOU'RE SLIPPING INTO YOUR SHADOW STYLE:

- **Hesitates to Express Needs:** "As long as it works for everyone else..."
- **Passive-Aggressive Behavior:** "Fine. I guess so. If that's what you want."
- **Avoids Big-Picture Thinking:** "As long as I'm helping someone today..."
- **Fears Confrontation:** "Oh, I'd rather not have that conversation."
- **Struggles to Take Action:** "I'm sure something will come up."

### THINGS YOU PROBABLY SAY:

"Just stick with what we planned."  
"Let's not rush into this."  
"How will this affect that?"  
"No need to get upset. Let's work together."  
"Think long-term."

**When you balance your natural compassion with confidence, you become a leader who not only cares for others but also ensures your own needs—and financial future—are protected.**



## THE ANALYZER

### WHAT MAKES YOU STAND OUT?

- **Thorough/Methodical:** You leave no stone unturned when making decisions.
- **Realistic/Practical:** You don't buy into hype; you focus on facts.
- **Disciplined/Detail-Oriented:** You spot things others overlook and ensure accuracy.
- **Loves Order/Systems:** If there's a more efficient way to do something, you'll find it.
- **Patient/Calculated:** You'd rather wait for the right opportunity than rush into something risky.

### THE SHADOW SIDE: THE PERFECTIONIST

Your attention to detail is your superpower—but when taken too far, it can turn into Perfectionism. You may find yourself stuck in endless research, hesitant to take action, and overly critical of yourself or others.

### SIGNS YOU'RE SLIPPING INTO YOUR SHADOW STYLE:

- **Thinks Worst-Case Scenario:** "This probably will not work."
- **Becomes Secluded/Secretive:** "Why do I need to share that info?"
- **Overly Rigid:** "Why should I have to change my plan?"
- **Struggles with Confidence:** "I don't know... am I ready for that?"
- **Gets Lost in the Details:** "Let me check that—for the tenth time..."

### THINGS YOU PROBABLY SAY:

"What's next on the list?"  
"How is this going to work?"  
"I don't know what quit means."  
"Is that accurate, or is it just a ballpark?"  
"Why think about it? Automate it."

**When you trust your instincts and allow yourself to take action—even when things aren't perfect—you turn your careful planning into real-world success.**