

WELCOME JULY Personal Development COACHING CALL

TRIBE INSIGHTS

Have team members who want to participate in August Retreat? Have them RSVP to sessions on the Team-only Event Space in Tribe.

ANNOUNCEMENTS:

Registration for August Retreat
Aug. 7 – Practice Development Call
Aug. 14 – Practice Office Hours

FOR TODAY'S QUESTIONS
[slido.com](https://www.slido.com), [#GoodVibes](https://twitter.com/GoodVibes)
on your phone or second screen

RELATIONSHIP TO MONEY

LIMITLESS COACHING CALL

July 17, 2023



STEPHANIE
BOGAN

“
Financial Success =
My Self
Worth
”

“
Money
is evil.
”

“
People with
money are
selfish.
”

“
You can't
take it with
you.
”

“
People with
money are bad.
”

“
Money =
Power
”

LIMITING BELIEFS Around \$\$\$

“
The early bird
gets the
worm.
”

“
Money
means I'm
okay.
”

“
More money
is better.
”

“
Mo' money.
Mo' problems.
”

“
The more I
charge, the
more I have
to prove.
”

“
Never enough
money.
”

“
Money doesn't
grow on trees.
”

“
Must work
hard to win.
”



Money is
SAFETY

You Can't Get There
FROM HERE





"I have to work long and hard to earn it."

Mother Teresa



"I don't need that much, if I have that much it means..."



Jerry Maguire

"Show me the money!"

"Making money is easy for me."

"I am deserving of money."



"I feel excited and grateful when I receive money."

"Time is my most valuable asset."

"I give more back to the world when I have more money."

"Making money is fun."



"My worth is determined by how much money I make."

"If I have more, I have more to lose."

"The more I charge, the more I have to prove."

"There's never enough money."

"People with money are bad."



SHARE YOUR MONEY STORY ON CHAT

20-MIN BREAKOUT



Relationship to Money Quiz:

IDENTIFY & SHARE YOUR MONEY "ORIGIN STORY"



Relationship to Money Quiz
Take 15 minutes to answer the following questions, which are here to help you get clear about your relationship with money.

1. We all have a relationship with money. Describe yours.
2. What is your next up-level with money? What would that make available?
3. What was your family-of-origin's money conversation?
4. What do you make money mean about you? About other people?
5. What are your top three complaints about money?

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We all have our

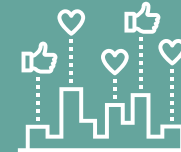
MONEY STORIES



YOUR STORY



CLIENT'S STORY

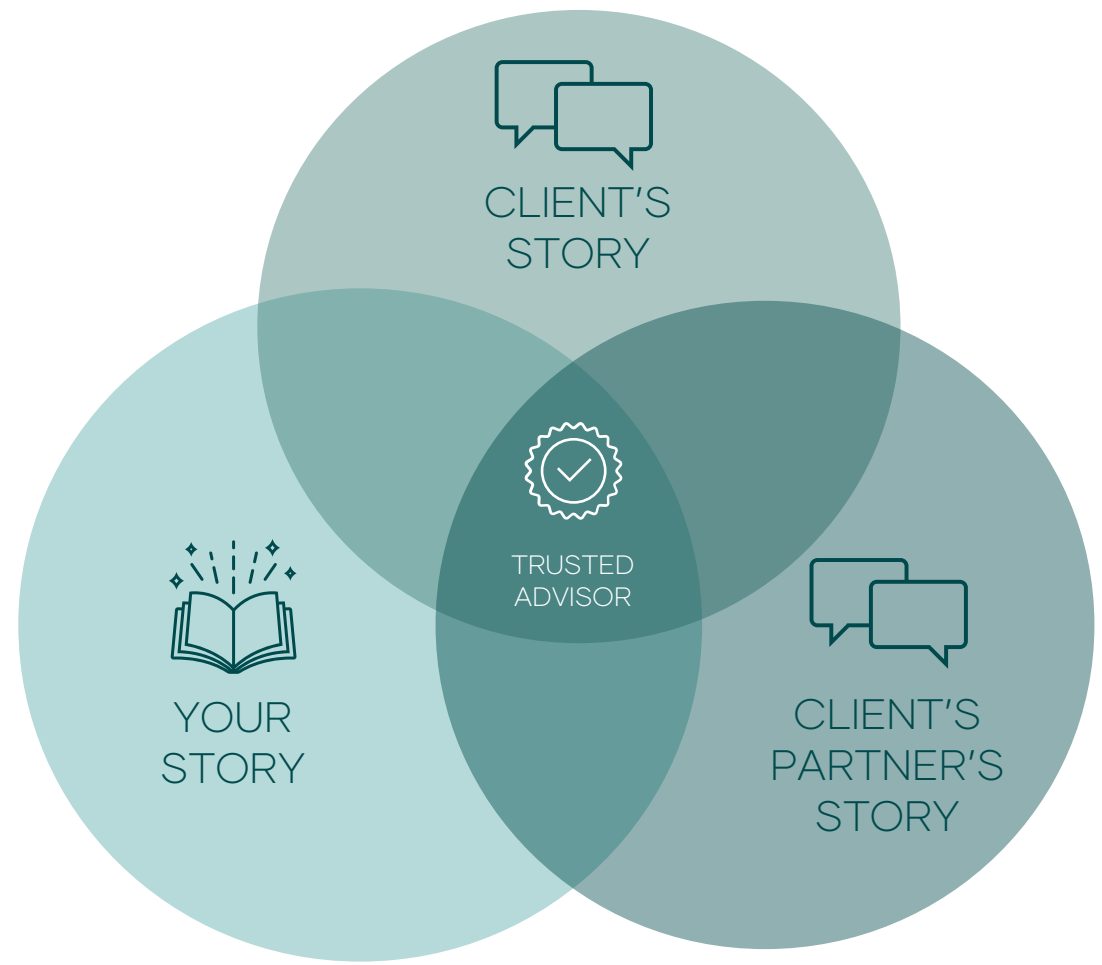


CLIENT'S PARTNER'S
STORY



CLIENT LIMITING BELIEFS
AROUND MONEY

CREATE ALIGNMENT WITH A Shared Story



trusted advisor =
TRUTH TELLER



CLIENTS & MONEY

can'ts, shoulds, have to's,
could haves....



Know your clients have a story.



Be on the lookout.

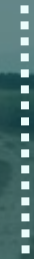


Get curious.



Lead forward.

BEING CLEAR
ABOUT YOUR STORY



LETS YOU HEAR
THEIR STORY

HEAR & RESPOND

Hey, I noticed that...
and this is different than we
discussed. I'm not attached
to it, but I am curious what
changed.

You are investing in my
services, and I want to
better understand why we
are changing the plan so I
can serve you better.

I am hearing you say....
Can you tell me more
about why that's
important to you?

What do you need right
now? I want to
understand why we are
doing it this way. What
is going to create the
ability for you to move
forward?

Money sometimes puts
people into a place where
they are scared. When
that happens to you and
when you are no longer
able to take my advice,
what do you need me to
do to help you?



LEARN MORE

- You are a Badass at Making Money: Mastering the Mindset of Wealth, Jen Sincero
- Soul of Money: Reclaiming the Wealth of Our Inner Resources, Lynne Twist
- Overcoming Underearning: A Five-Step Plan to a Richer Life, Barbara Stanny
- Think & Grow Rich, Napoleon Hill



ADAPT & APPLY

- Take the Relationship to Money Quiz
- Review the 7 Mindsets: Money Beliefs resource in order to help you identify and address each of your own money stories



TAKE ACTION

- Reframe your relationship with money to set out new more empowering money beliefs.
- Practice continuous awareness of your money stories. Ensure you are speaking from success state versus reactive survival state.



LIMITLESS Q&A