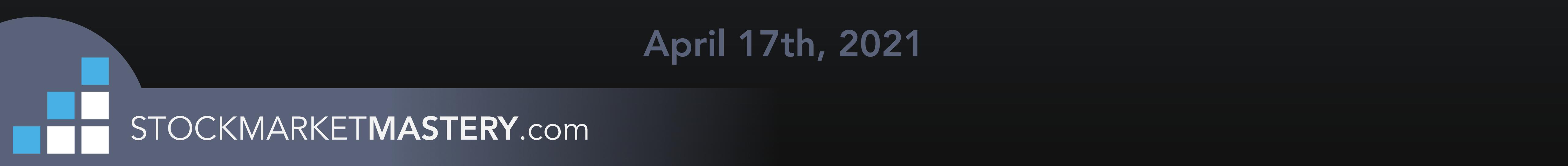


# Passing The Financial Baton, But Still Investing Together

Gatis and Grayson Roze

April 17th, 2021



How we think together  
and make investing  
a joint venture



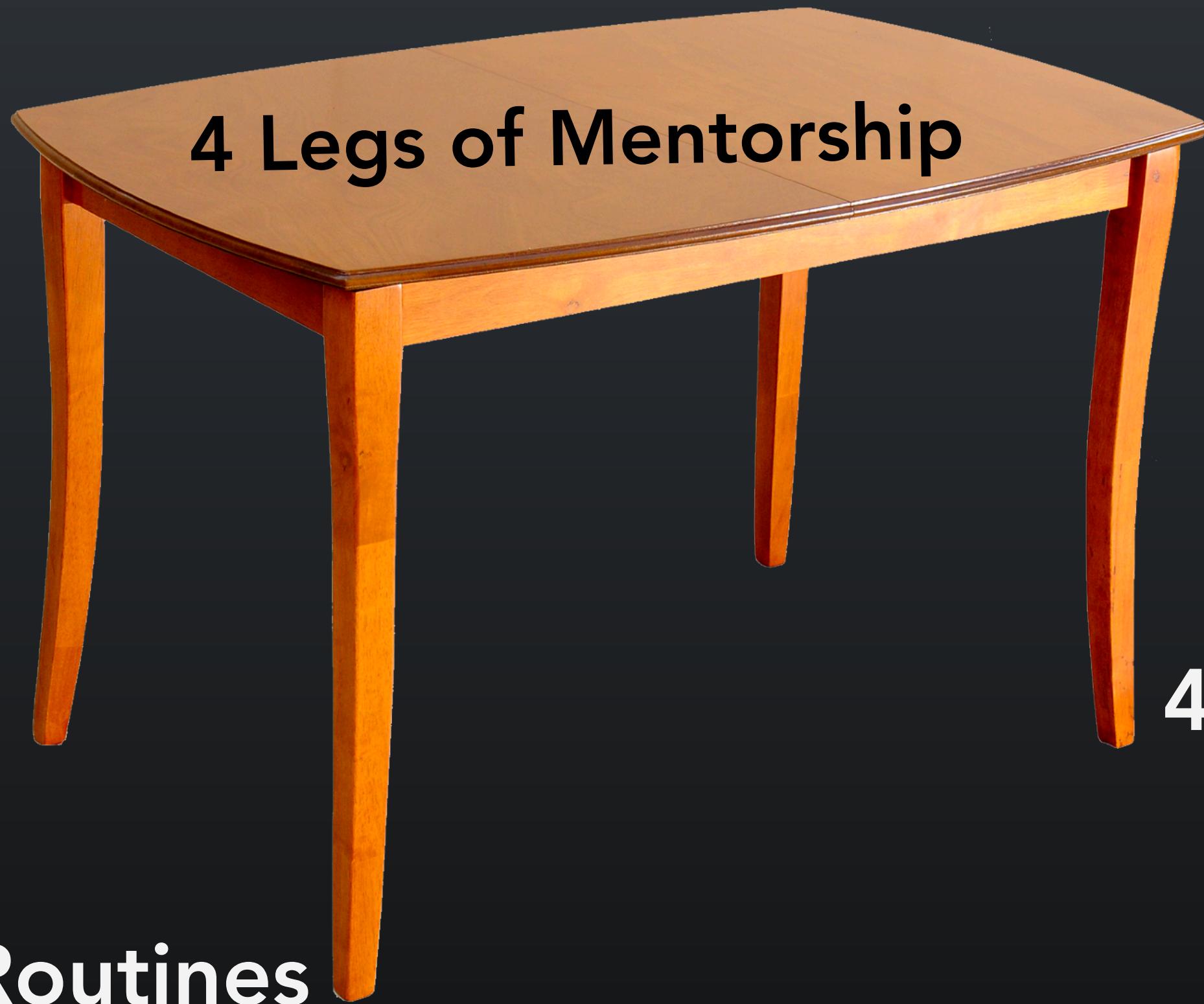
# MONEY MENTORSHIP

1. Sparking Motivation

2. Understanding  
The Investor Self

3. Tools, Skills & Routines

4. Action



STOCKMARKETMASTERY.com

# T = Tune In

Simply listen carefully to one another. Good two-way communication is always necessary for mentorship to be effective.

# A = Accept

Be flexible and understanding of the other person's financial inclinations and abilities.

# D = Dignity

Don't judge the other person's behavior as good or bad; discuss their choices with respect, understanding, and patience.

# S = Solution

Search for and settle on a mutually satisfactory solution. It doesn't need to be perfect. Tiny steps are fine.



What works  
when navigating  
family finance



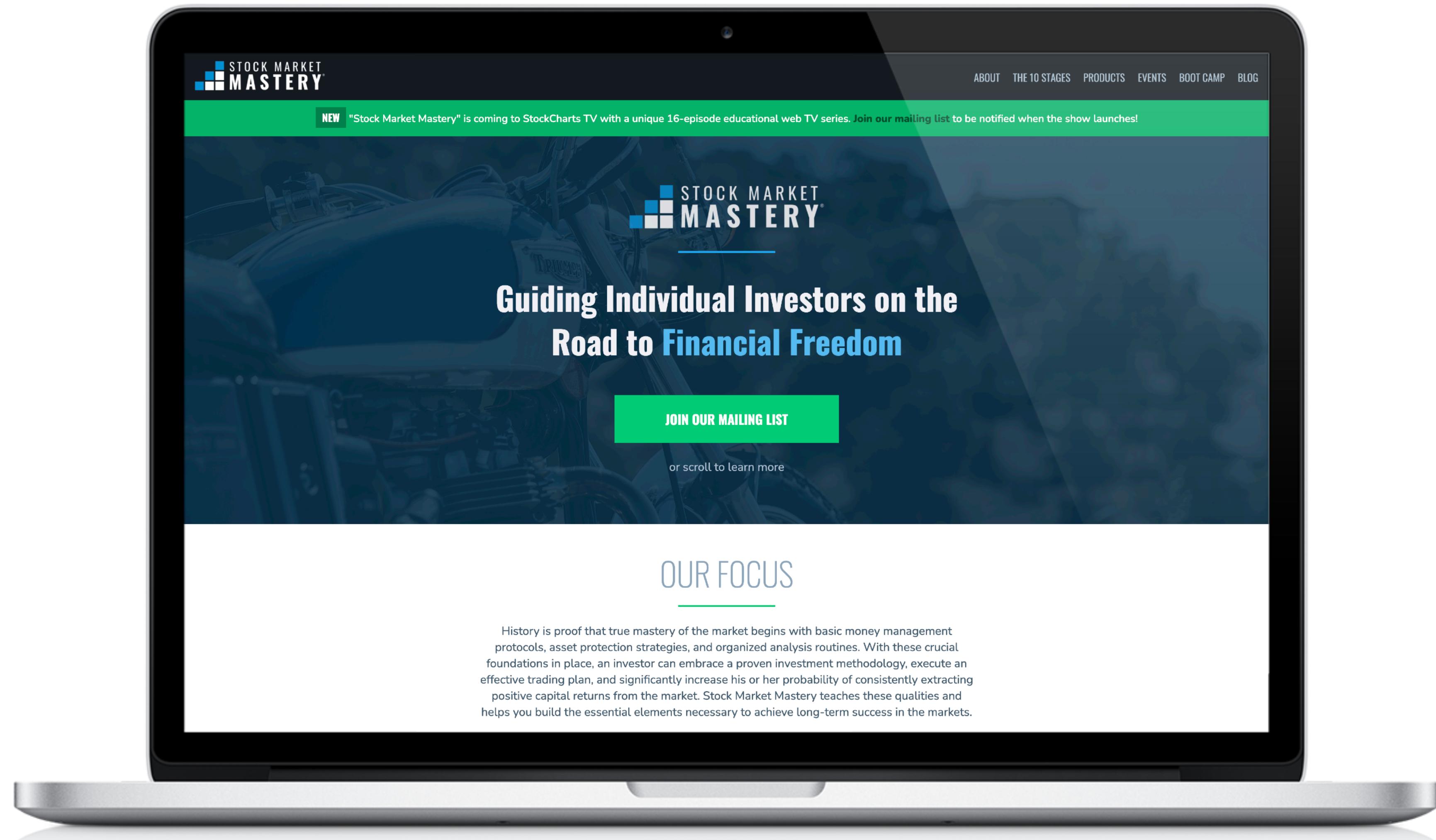
What doesn't work  
when navigating  
family finance



Combining perspectives  
across generations



# Let's Stay In Touch!



STOCKMARKETMASTERY.com

