

Passing The Financial Baton, But Still Investing Together

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How we think together
and make investing
a joint venture



MONEY MENTORSHIP

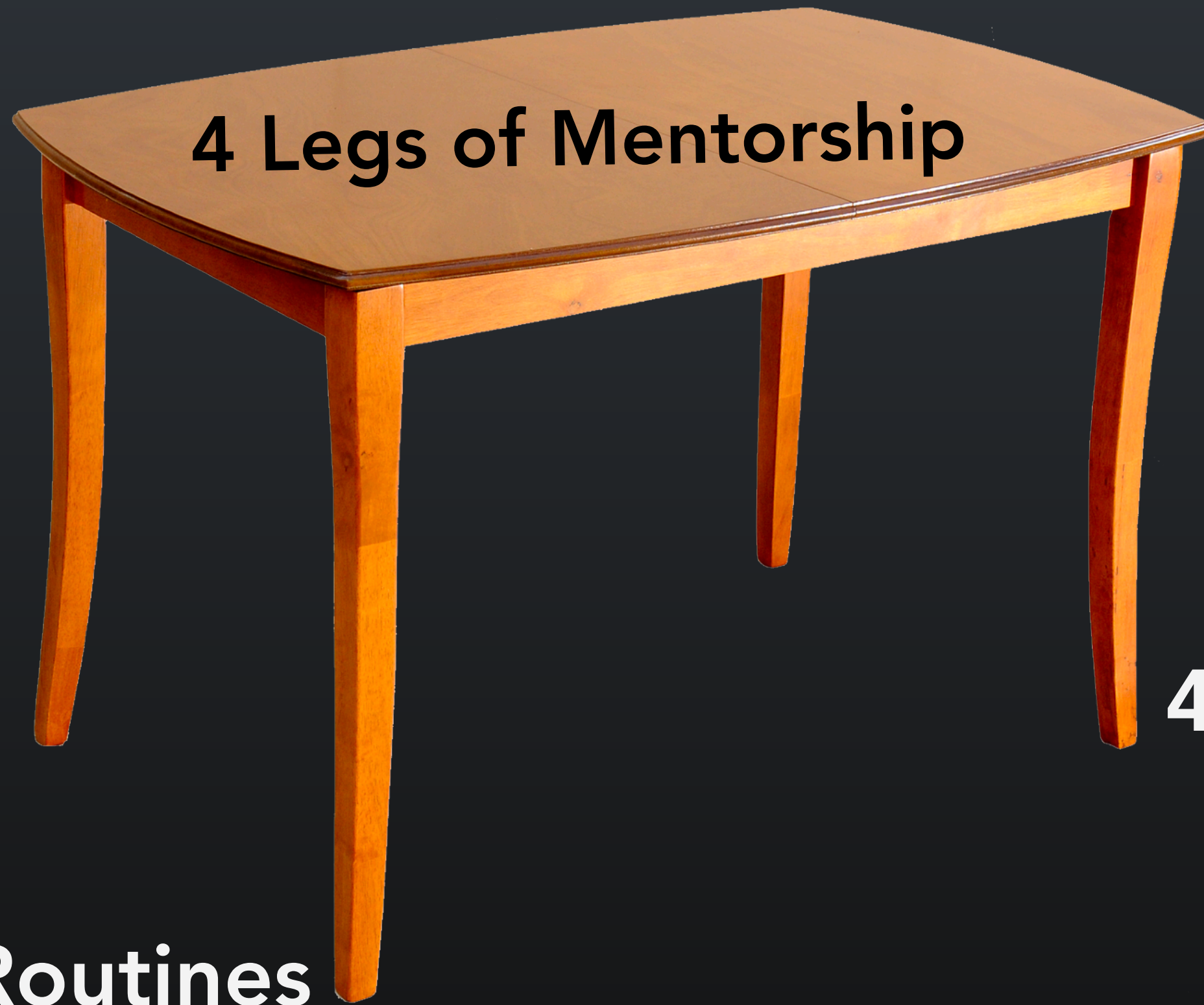
1. Sparking Motivation

2. Understanding
The Investor Self

4 Legs of Mentorship

4. Action

3. Tools, Skills & Routines



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!

