THE NARRATIVE IMPERATIVE

Insights & Actions: No less than 1, no more than 3

3 Questions:

1) __________________________________________________________

2) __________________________________________________________

3) __________________________________________________________

What’s the point?

• Our ___________________________ shape our _____________ about life and money.

• What we _______________ about money will impact what we do _______ and ________ it.

My Story – Reflections:

________________________________________________________________________________________

________________________________________________________________________________________

Your Story:

What are the ______________________ that have shaped your life, work and approach to money?

________________________________________________________________________________________

________________________________________________________________________________________

________________________________________________________________________________________

________________________________________________________________________________________

________________________________________________________________________________________

________________________________________________________________________________________
How have your experiences shaped your...

values?__________________________________________________________________________________________________________________
goals?__________________________________________________________________________________________________________________
relationships?__________________________________________________________________________________________________________
budget?____________________________________________________________________________________________________________________
giving?___________________________________________________________________________________________________________________
investment philosophy?_____________________________________________________________________________________________________
retirement plans?___________________________________________________________________________________________________________
estate plans?______________________________________________________________________________________________________________
career?__________________________________________________________________________________________________________________
planning style?____________________________________________________________________________________________________________
client interactions?________________________________________________________________________________________________________

Story in Theory:

80%: Why?
_________________________________________________________________________________________________________________________
_________________________________________________________________________________________________________________________
_________________________________________________________________________________________________________________________

GOOD Financial Planning:

CFP® “Financial Planning Process” & 200 Series Practice Standards
_________________________________________________________________________________________________________________________
_________________________________________________________________________________________________________________________
_________________________________________________________________________________________________________________________
Story in Practice:

Knowing vs. Doing:
Why don't we...?

1) _______________________________________________________

2) _______________________________________________________

What can we do better?

According to Kahler/Klontz:

_________________________________________________________________________________________________________________________

_________________________________________________________________________________________________________________________

_________________________________________________________________________________________________________________________

Facilitating your clients’ stories with Money Quotient tools:

Begin in the__________.

Explore the ________.

Envision the ____________.
Wheel of Life

Client Name

Date

Directions: This exercise will help you to assess your growth and development in each Facet of Life. It will also help you to evaluate the degree of balance and level of life satisfaction you are now experiencing.

Step #1—Place a dot on each spoke that indicates your level of satisfaction in that particular Facet of Life. Use a scale of 0 to 10 with 0 at the hub and 10 at the rim. A zero indicates no satisfaction and a ten indicates the highest degree of satisfaction.

Step #2—Now draw a line to connect the dots and create your life wheel.

Step #3—Is your life wheel round or does it show flat spots? Is it deflated or is it full? What does this exercise tell you about your life? Is your life balanced? Are there areas of your life that need attention? In what facets would you like to experience more satisfaction?
Great Story Tellers:

_______________________________________________________

_______________________________________________________

Where is your story __________? 

Insights & Actions:
(No less than one—no more than three)

1) ________________________________________________________________________________________________________________________

2) ________________________________________________________________________________________________________________________

3) ________________________________________________________________________________________________________________________

Our story informs the decisions we make in life, and the impact of those decisions returns to shape our story as well as our clients’. 

Please stay in touch:
Tim Maurer, CFP®
Director of Personal Finance
The BAM ALLIANCE
Email: tim@timmaurer.com
Twitter: @TimMaurer
Mobile: 410-913-3332
www.TimMaurer.com

Personal finance is more personal than it is finance.