



February 2022 – Money Talks 4-Part Series

This 4-part Money Talks Series is a great way to get people talking about money and their financial plans. Money can be a difficult subject for many couples. Starting the conversation can be a powerful way to get people to open up and make progress on their financial goals.

The introduction post and 4 conversation starters are laid out in an easy-to-share order with sample accompanying text (written below) for you to share to your database or social media.

Special Notes:

- **There are a total of 5 images for this campaign.**
 - An Introductory Post
 - 4 Money Talks Topics
- **The written posts should be viewed as potential templates you can use as a basis for your marketing.** Feel free to (appropriately) modify or edit the content as necessary to fit your business. That is to say, you can use the images without using our accompanying text below. Use what is right for your business model and marketing strategy.
- **Make sure to insert your online calendar link!** As always, we want our Content Marketing Resources to be an opportunity to open the door for you to have meaningful conversations with prospects and clients. Insert your online calendar link as appropriate to encourage readers to take action RIGHT THEN!

Money Talks Introduction Post



Image: Money Talks 4-Part Series 1

Whether you're married, engaged, dating, or just like to have conversations with yourself (we won't judge), being transparent and accountable for your money strengths and weaknesses is important if you want to reach your goals and live your *life of significance*.

To help you have these real (and necessary) conversations, we'll be sharing important topics and key points to get the conversation started throughout the month so you can make meaningful progress on the right financial plan for you.

Be on the lookout for the first topic COMING SOON!

Money Talk 1: History



Image: Money Talks 4-Part Series – 2

For better or worse, we start learning money habits and financial principles from the time we are little. How our parents or guardians handled money shaped the way we think about it too. In fact, those memories can have a greater impact on our own habits in ways we might not have considered.

Think about it...

If your parents or grandparents lived through the Great Depression, were they thrifty or did they easily throw things away?

If money was never discussed in your household, is it difficult for you to talk about it now?

If the budget was tight and always seemed like the simplest emergency could prove to be a huge disaster, does that impact the way you treat money today?

Our “money history” can have a dramatic impact on the way we spend, save, and invest. And when we are in relationships, the other person has a financial history too, for better or worse. Conversations about our past and any financial weaknesses we may have may not be easy, but it’s important to be transparent if you want to reach your goals together.

Use the following **Key Points to Consider** to get this Money Talks conversation started:

- What type of *money history* did I learn growing up?
- How has that history impacted the way I handle my money today?
- Without assessing blame, discuss with your spouse or significant other how your *money history* has impacted where you are currently with finances.

Money Talk 2: Values



Image: Money Talks 4-Part Series - 3

We all care about someone or something.

Whether it's family, church, charities and causes, or hobbies and bucket-list dreams, we want our financial plans to enable us to live and give with confidence and peace of mind.

After all, money IS NOT the ultimate thing in life. It is merely a tool that, when we use it well, gives us the freedom to live into our values and invest in the people and things that truly matter.

Alignment between your values and your financial plan is vital to achieving your retirement goals.

Use the following **Key Points to Consider** to get this Money Talks conversation started:

- Write a list of the people and organizations you love and love to support.
- How does your current financial plan set you up for success in retirement while also aligning with those values?
- Do you have a plan to take care of those interests even after you pass?

Money Talk 3: Habits



Image: Money Talks 4-Part Series- 4

Just like we all have *money histories* and values that matter to us, we all have money habits we need to be aware of if we want to reach our financial and life goals.

Some are SAVERS and some are SPENDERS.

Some are RISK AVOIDERS and some are RISK TAKERS.

Some plan for the FUTURE and some plan for the PRESENT.

Often, these different groups end up marrying each other (they say opposites attract, right?). So how do you work toward a financial goal with someone who is different than you?

You guessed it, start by talking about it!

Use the following **Key Points to Consider** to get this Money Talks conversation started:

- Of the categories shared above, which ones describe you?
- Which ones describe your significant other?
- How can your money habits *help you* and *harm you* when it comes to preparing for retirement?
- How might you bring balance among your habits to achieve your financial plan together?

Money Talk 4: Plan



Image: Money Talks 4-Part Series - 5

If you want to achieve your financial goals, you need a plan. No one drifts aimlessly to success. The question is – what is right financial plan for you?

The right financial plan for you is designed to meet your needs and achieve your goals while also compensating for the money habits and tendencies you’ve (hopefully) already discussed from the previous topics.

While the other conversations have been primarily about the ones you have within your household, this one is important to have with a financial professional, like me.

Some **Key Points** we will consider together are:

- Your goals
- Where you’re currently at with your finances
- Where you want to go with the right financial plan.

Our meeting is easy, stress free, and no obligation. Simply click here [\[INSERT CALENDAR LINK\]](#) and pick a time that is convenient for you.

Let’s get this conversation started so we can make sure you are headed in the right direction for retirement!