Understanding Money Types

A Course for Advisors

Overview

What Are Money Types?

Characteristics of the 8 Money Types

Client Relationship

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Robina Bennion

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- Certified Money Coach (CMC)®
- Certified Business Archetype Coach
- Ramsey Solutions Master Financial Coach
- Certified Public Accountant

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MONEY TYPES

archetypes

Consists of unconscious patterns, thoughts, or beliefs that are active in your life.

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BELIEF

What is a belief you have about money?

Where did that belief come from?

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POLLING QUESTION #1

BELIEF

learned

A belief is a thought form.

Money is bad.

Money makes you happy.

You can’t trust men with your $.

You can’t trust women with your $.

I will never make money at that.

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BEHAVIOR

Behavior is hard-wired physiologically

Hidden from our thinking until we figure out how it came to be.

90%

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WERE YOU EDUCATED ABOUT MONEY?

WAS THE SUBJECT OFTEN HIGHLY EMOTIONAL?

WAS IT SAFE TO TALK ABOUT MONEY?

TRAUMA
DIVORCE
PARENTS
FRIENDSHIPS
HARDSHIPS
AFFLUENCE

OTHER FACTORS

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Money as a Mirror

- Whatever is happening on the outside is but a mirror or *reflection* of the inside.

- We must first do our work to transform the inner economics from the inside (inner reality.)

- To manifest and create a new and different economic reality on the outside (external world.)

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Relative to money and the brain, we are often operating from the primitive brain which is largely instinctive.

EMOTIONS + MONEY = FIGHT OR FLIGHT

This is why many of our financial behaviors are often more *emotional and reactive*, rather than *rational and logical.*

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POLLING QUESTION #2

The Hero

Characteristics

Powerful, Driven, Disciplined

Goals

Recognize conflict as opportunity for growth.

Lessons

Know what battles to fight.

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The Nurturer

Characteristics

Long-suffering, Disappointed, Resentful

Goals

Acknowledgement and acceptance

Lessons

Work and heal their wounds.

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The Apprentice

Characteristics

Trusting, Indecisive, Fearful or Anxious

Goals

Safety at all costs

Lessons

Safety in own abilities

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The Maverick

Characteristics

Restless, Undisciplined, Lives for today

Goals

Focus and discipline

Lessons

Master qualities and transform

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The Victim

Characteristics

Blame others, Emotional, Feels Powerless

Goals

Release the past. Embrace their power.

Lessons

Understand and heal past wounds.

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The Ruler

Characteristics

Controlling, Manipulative, Oppressive

Goals

Feel complete, comfortable, and at peace.

Lessons

Satisfaction in what they have.

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The Initiator

Characteristics

Highly Artistic and/or Spiritual, Detached, Nonmaterialistic

Goals

Make peace with money.

Lessons

Integrate the spiritual with the material world.

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The Initiator

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Characteristics

Highly Artistic and/or Spiritual, Detached, Nonmaterialistic

Goals

Make peace with money

Lessons

Integrate the spiritual with the material world.

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The Alchemist

Characteristics

Spiritual, Wise, Confident, Compassionate

Goals

Fully awake and aware.

Lessons

Made peace with the past and understands power exists within.

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POLLING QUESTION #3

Types ~v~ Personality

Our archetypes or “money types” are not your personality nor are they fixed.

They merely reflect *tendencies* toward certain patterns and behaviors **relative to money.**

Each one of us has *all* eight money types inside of us… because they are part of the collective unconscious.

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The Client Relationship

How do we advise our clients?

Empathy v Expertise

The energy you bring

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Questions?

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POLLING QUESTION #4

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THANK YOU

Be Well ~ Be Safe

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Money Type Quiz

Soul~Self~Wealth Newsletter