



SHARE SAVE SPEND®  
meaning + money

## Roadmap to Financial Wellbeing

- *Our relationship with money is vital*—it impacts our happiness, life fulfillment and wellbeing.
- *Our money narrative drives our behavior*—what we tell others and ourselves impacts how we feel and act.
- *Personal value is different from net worth*—how we feel about ourselves is determined by our relationships, practices, stories and desires.

### Phase 1—Discovery and Design

In Phase 1, Share Save Spend will engage the family to assess the current state of money and the role it plays in their lives. Through a series of interviews we will determine which money issues are most critical for current/future success – both individually and collectively.

### Phase 2—Educate and Equip

In Phase 2, we will introduce key concepts and tools, enabling each family member to engage, discover and act in ways that are most relevant for them and the goals of the family.

