



jump  global

summit



3 QUESTIONS
THAT WILL CHANGE
YOUR RELATIONSHIP
WITH MONEY



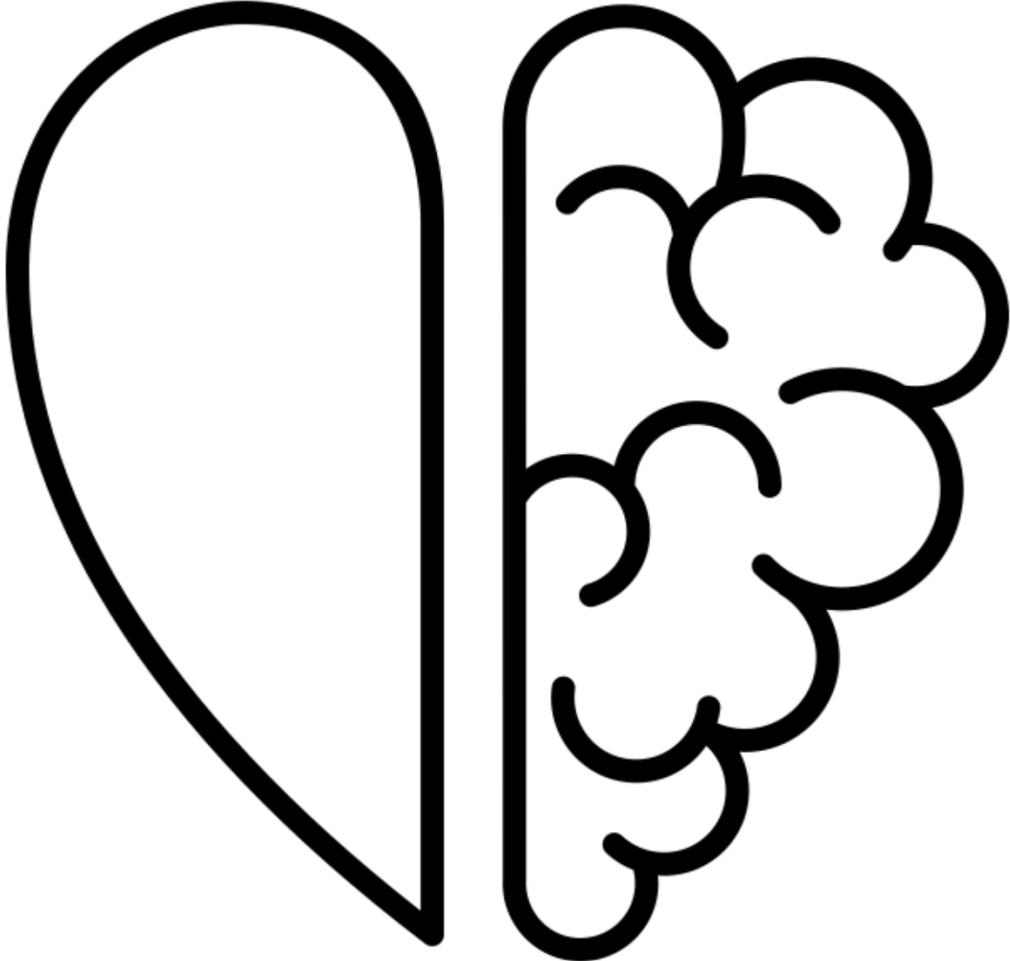
SPENSER LISZT, CFP®

Motif Planning
Holistic Financial Life Planner



MARNI WANDNER, NBC-HWC

Future Present
Board-Certified Wellness Coach
+ Performance Coach



THE SEVEN STAGES OF MONEY MATURITY®

Kinder Institute of Life Planning

- 1 Innocence
- 2 Pain
- 3 Knowledge
- 4 Understanding
- 5 Vigor
- 6 Vision
- 7 Aloha

INNOCENCE

Childhood state we are born in and derive money beliefs from

PAIN

Discovery that we have more money than some and less than others and work is necessary to make a living

KNOWLEDGE

Learning financial techniques such as saving, budgeting and investing

UNDERSTANDING

Emotional work to come to terms with feelings around money

VIGOR

The energy required to reach financial goals

VISION

**The direction of that energy toward the health and welfare
of communities**

ALOHA

Compassionate goodwill using money to perform acts of kindness without expecting anything in return

FIVE MONEY ARCHETYPES

- 1 **The Achiever**
- 2 **The Connector**
- 3 **The Giver**
- 4 **The Analyst**
- 5 **The Thinker**

THE ACHIEVER

Money Patterns:

- Overworking
- Tying value or identity to productivity
- Meeting money stress with force or “pushing through”

Money Shifts:

- Letting go of proving worth through doing - value doesn't need to be earned
- Focusing on aligned, strategic effort - working smarter, not harder
- Allowing rest and trust to become part of how you work and your money grows

THE CONNECTOR

Money Patterns:

- Spending or giving impulsively to feel love, joy or validation
- Avoiding structure, preferring spontaneity over planning
- Getting emotionally overwhelmed or physically affected by money stress

Money Shifts:

- Detaching connection and validation from spending or generosity
- Grounding excitement with consistency and mindful money choices
- Building emotional safety through stable, sustainable habits

THE NURTURER

Money Patterns:

- Overgiving or undercharging
- Prioritizing others' needs over personal stability
- Staying in roles that feel "safe" even when outgrown

Money Shifts:

- Treating your own financial wellbeing as part of how you care for others
- Practicing receiving and asking for what you want
- Creating balanced exchanges - giving and receiving in equal measure

THE ANALYST

Money Patterns:

- Overthinking
- Getting stuck in “making the right decision” mode
- Meeting money stress with control and self-criticism

Money Shifts:

- Moving from “perfect certainty” to “confident enough” to act
- Loosening control - progress creates clarity
- Letting go of tying self-worth to bank balance; forgiveness

THE THINKER

Money Patterns:

- Avoiding or detaching from money due to fear, overwhelm or mistrust
- Rejecting traditional financial systems
- Flowing between extremes - feast and famine, action and retreat

Money Shifts:

- Building flexible systems that create both freedom and security
- Facing money with curiosity instead of fear or avoidance
- Engaging with structure as a tool for flow, not a cage for it

WHO ARE YOU



WHAT ACTIONS ARE YOU TAKING?



**HOW DO YOUR ACTIONS CORRESPOND TO
WHAT YOU WANT?**

**IF I LOOKED AT YOUR CALENDAR AND YOUR
BANK STATEMENT...**

**WOULD THEY BOTH TELL THE SAME STORY
ABOUT *WHAT YOU VALUE MOST* AND
THE GOALS YOU'RE WORKING TOWARD ?**

**CREATE YOUR
VISION**

1. DESIGN YOUR LIFE

Imagine that you are financially secure, that you have enough money to take care of your needs, now and in the future.

- ***How would you live your life?***
- ***What would you do with the money?***
- ***Would you change anything?***

Let yourself go.

Don't hold back your dreams.

Describe a life that is complete, that is richly yours.

2. YOU HAVE LESS TIME

You visit your doctor who tells you that you have five to ten years left to live.

The good part is that you won't ever feel sick.

The bad news is that you will have no notice of the moment of your death.

- ***What will you do in the time you have remaining to live?***
- ***Will you change your life, and how will you do it?***

3. TODAY'S THE DAY

This time, your doctor shocks you with the news that you have only one day left to live.

Notice what feelings arise as you confront your very real mortality.

Ask yourself:

- ***What dreams will be left unfulfilled?***
- ***What do I wish I had finished or had been?***
- ***What do I wish I had done?***
- ***Did I miss anything?***

STATEMENT OF FINANCIAL PURPOSE

Spend time _____ with _____ while
_____, _____ and _____.

ACTION PLAN

- *What's one small thing you can do to get started on this path?*
- *How will you measure your progress?*
- *How can you build in an accountability strategy?*
- *Who can be involved/who can you communicate this plan to?*

CONTINGENCY PLAN

- *What could get in your way?*
- *What can you plan to do if this happens?*
- *Why is this important to you?*



Spenser Liszt, CFP®

spenser@motifplanning.com

www.motifplanning.com

@spenserliszt



Marni Wandner, NBC-HWC

marni@futurepresentco.com

www.futurepresentco.com

@futurepresentco