

YOUR MONEY STORY

Every money decision has a story underneath it.

THE NUMBERS ARE ONLY PART OF THE STORY.

The way you save, spend, invest, give, worry, plan, and make decisions has been shaped by experiences long before today.

This five-minute exercise is designed to help you uncover what money represents to you - and, if you have a partner, understand what it represents to them.

Complete your answers separately before comparing.

5 MINUTES · TWO PERSPECTIVES · ONE BETTER CONVERSATION

1

WHAT DOES MONEY MEAN TO YOU?

Without overthinking it, finish this sentence three different ways:

To me, money means...

1. _____
2. _____
3. _____

IF YOU FEEL STUCK, THINK ABOUT WORDS LIKE:

Safety · Freedom · Opportunity · Success · Family · Choice · Stability · Generosity · Achievement · Control · Experiences · Legacy

Use your own words. There is no right answer.

2

WHAT'S UNDERNEATH IT?

Choose the answer above that feels most important.

Why does money mean this to me?

What experience may have taught me this?

Think about childhood, parents, training, debt, career experiences, scarcity, success, failure, or a moment you still remember.

When this need feels threatened, what do I tend to do?

Spend? Save? Avoid? Work more? Delay decisions? Seek control? Something else?

COMPARE THE STORIES

The goal isn't agreement. It's understanding.

3

BEFORE YOU COMPARE...

If you're completing this with a spouse or partner, don't show them your answers yet.

What do you think money means most to your partner?

1. _____
2. _____
3. _____

NOW COMPARE. YOU ARE NOT TRYING TO MATCH. YOU ARE TRYING TO UNDERSTAND.

“What made you choose that?”

THEN LISTEN. NO CORRECTING. NO DEFENDING. NO SOLVING. JUST UNDERSTAND THE STORY UNDERNEATH THE ANSWER.

4

ONE THING I UNDERSTAND DIFFERENTLY NOW

After your conversation:

Something I understand better about myself is...

Something I understand better about my partner is...

SAME MONEY. DIFFERENT STORY.

Two people can look at the exact same bank account and feel completely different things.

ONE SEES SAFETY. ANOTHER SEES MISSED OPPORTUNITY. • ONE SEES FREEDOM. ANOTHER SEES RISK.

Neither reaction exists in a spreadsheet. Understanding the story underneath your money does not eliminate every disagreement. But it gives you a much better place to begin.

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WANT HELP CONNECTING THE STORY TO THE NUMBERS?

Understanding why you make financial decisions is powerful. But the next step is turning that clarity into a coordinated financial life.

The complimentary Physician Financial Wellness Diagnostic helps physician families step back, see the whole picture, uncover blind spots, and identify what deserves attention first.

NO PRODUCT PITCH. NO PRESSURE. JUST A CLEARER PICTURE OF WHERE YOU STAND AND WHAT TO DO NEXT.

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SCAN TO BEGIN