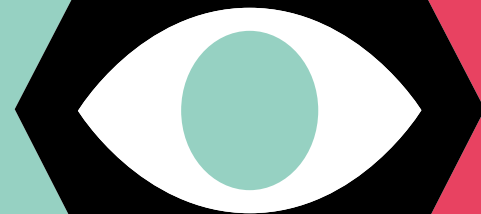


MONEY STORIES

Is there a responsibility
associated with wealth?
If yes, what could it be?

From the team at

MODERNIST[®]
FINANCIAL



Friends,

At Modernist, we help our clients structure their wealth around their values, in part by making space to discover and explore our money stories.

In 2020, we created our first DIY version of the Modernist Money Stories events, so this work could continue even from home. This year, we are gifting you this tool to inspire conversations about Wealth & Responsibility.

We invite you to use this tool to host deeper conversations about what these ideas mean to you and the people you love.

Enjoy,

Georgia + Team Modernist.

HOW TO USE THIS TOOL TO UNDERSTAND YOUR MONEY STORY:

Invite a friend(s) or loved one(s) to join you in this conversation.

Set aside a specific time in a quiet space without distractions. Maybe during a meal, with drinks, in a park, or online...

Make sure each participant has a copy of this guide and a writing utensil.



When you see this symbol, the text is meant to be read aloud. You can take turns or nominate a reader.

IT ALL STARTS WITH YOUR STORY.



Most of us aren't aware of how our inherited money stories drive our financial decisions and behaviors.

This tool invites us to bring our inherited money stories to light, so we can begin crafting a story that supports our daily actions, our individual well-being, and the greater community.

Our question today is:

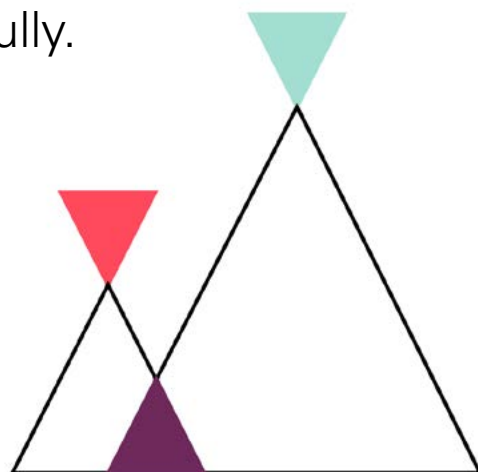
Is there a responsibility associated with wealth? If yes, what could it be?

We're not expecting an answer today, but instead, we hope to understand the question more fully, together.

So, let's get started.

First, let's take one minute to sit in silence together.

Take three deep breaths, exhaling fully.





Fertile conversations involve shared principles and agreements. Let's embrace these in our conversation by taking turns reading ours aloud.

PRINCIPLES

This is an all leader group

Responsibility is shared for the quality of the experience

Our purpose is to seek connection and understanding

AGREEMENTS

Hold confidentiality

Listen with attention, compassion, and curiosity

Honor the personal choice to speak or not

Speak with intention

Remain aware of the impact of your contributions

Resist the urge to interrupt

Share stories, avoid advice

Relish our differences

**List 5 words that come to mind
when you think about WEALTH**

**List 5 words that come to mind
when you think about RESPONSIBILITY**



Let's share a few of our words aloud with each other.
Are any of our words surprising?



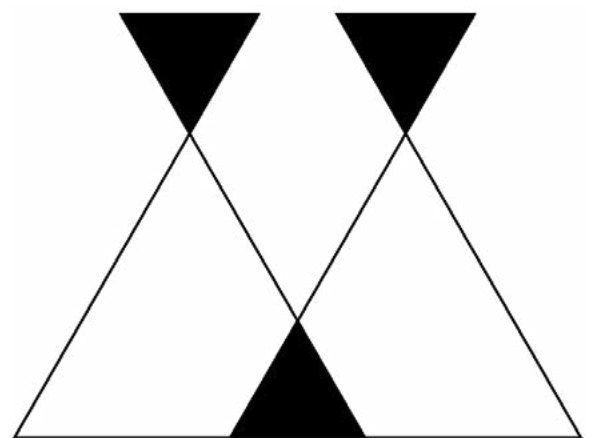
WHY WEALTH & RESPONSIBILITY?

We believe in generosity focused on the root causes of social, racial, economic, and environmental injustice. We aim to fund and support those who are most impacted to be the decision-makers.

By sharing this vision and accessible entry points for taking action:

We hope to collectively inspire action towards equal distribution of resources: skills, social capital, time, and money.

With this in mind, we've created this guide to help you and your community explore wealth and responsibility and to give you ideas to consider for taking action.





As Rilke recommended in *Letters to a Young Poet*:

"I want to beg you, as much as I can, dear sir, to be patient toward all that is unsolved in your heart and to try to love the questions themselves like locked rooms and like books that are written in a very foreign tongue. Do not now seek the answers, which cannot be given you because you would not be able to live them. And the point is, to live everything. Live the questions now. Perhaps you will then gradually, without noticing it, live along some distant day into the answer."



EXPLORING WEALTH & RESPONSIBILITY

Wealth (an abundance of resources) could be categorized as **time, social capital, skills, and money.**

How do the cultures you most identify with ascribe responsibility to wealth? ... Or not?

List 3 quick examples of how the culture you most identify with ascribes responsibility to wealth, or not?



Let's share what we wrote.

Can you think of a person, artist, organization, or movement that spends their money, time, social capital, or skills to build a better world?

What do they do? What do you notice about their behaviors?

What inspires you about these efforts?



Let's share what we wrote.

Imagine you have all the resources you need, what would you like the responsibility of wealth to be in your community... if anything?



Let's share what we wrote.

ACTION & ACCOUNTABILITY

Systemic change is essential, but **individual behavior models and therefore builds momentum for social justice movements**. Here are some entry points to making change, some accessible action items, and some small shifts you could make to contribute towards the greater good.

Can you think of ways you are currently spending your resources to support efforts for social change?

Consider a question to research—which one is interesting to you?

- ✎ If you **support organizations**, are the people most impacted by this injustice seated at the table? Are you clear on who makes decisions?

- ✎ As you **spend money**, could you shift a recurring expense to a minority-owned business? To a local business? To a B Corp?

- ✎ As you **spend time, social capital, or skills**, could you offer these resources to organizations working for justice?

What would need to shift (as one small step) to get you closer to your vision?

- ✎ Would you like to be each other's accountability partners for this small step?

- ✎ Would you like to set a reminder to check in with yourself and your partner in 3 months, 6 months, a year?



Let's share what we wrote.

List at least one thing you heard that you appreciated in this conversation.

WE'RE BUILDING A NEW MONEY CONSCIOUSNESS.

Modernist Financial is a wealth management firm that helps progressive people structure their wealth around their values. We take a data-driven approach to investment management and financial planning. We make business decisions that align with our values.

SCHEDULE A FIT CALL

Modernist clients are those who have inherited or retired, or successful founders preparing for a business sale. If this sounds like you or someone you know, we'd love to talk!

Reach out to us at hello@modernistfinancial.com

SEASONS OF ACTION



THANK YOU

For making the time to explore your Money Story.
At Modernist, we believe reflection is essential to
informing values-focused financial decisions.

Please help us spread this tool! You can find a PDF to
download at modernistfinancial.com/toolkit
We're also happy to mail a copy to someone you know,
just drop us a line at hello@modernistfinancial.com

WE'RE HERE TO HELP

MODERNIST UNIVERSITY

We offer a variety of resources for our clients and community,
including Investment Insights, our free MoneyToolkit, a lively
blog, and more about Money Stories.

RESOURCES + REFERRALS

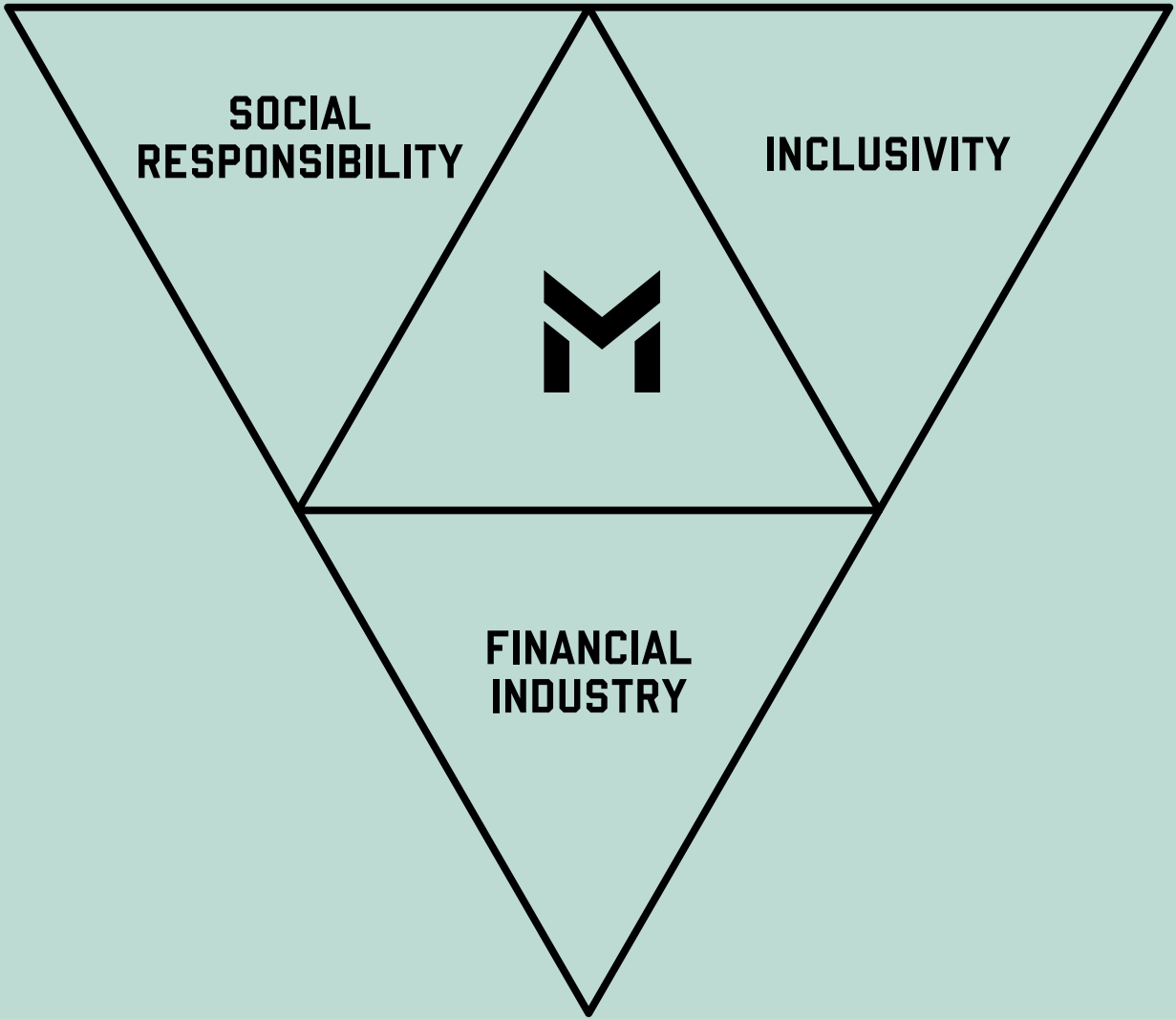
We've compiled a list of resources, organizations, podcasts,
and books we find helpful for digging deeper into your
relationship with money. You'll also find a directory of
recommended money coaches, financial planners, and
financial therapists.

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[@modernistfinancial](https://modernistfinancial.com)

Notes, Plans, Action Items

A large, empty, light pink rectangular area with rounded corners, intended for notes, plans, and action items. The area is completely blank, providing a space for the user to write or draw.



WE WALK OUR TALK

B Corp. Fee Only. Fiduciary.