

[YOUR FINANCIAL ARCHETYPE]

The Idealist

As an Idealist, you likely intend to help solve one (or more) of society's big problems—and you aspire to direct your resources and energy toward those causes. Social and/or environmental transformation isn't too tall an order, and you very likely believe that large-scale systems change is the only way we'll get to where we need to be. On bad days, you experience mistrust, skepticism, or disillusionment; on good days, you're able to express vision and great efficacy through the use of your resources.

Today, find one way to use money to further your ideals. The next time you speak about your ideals to someone, focus more on describing the attributes of the society you want to see, more than the one you're hoping to move away from.

You're probably an Idealist if one or more of the following is true:

- ▶ You value working towards societal transformation or some other expression of your values (which could include non-profit service, creativity, or spiritual practice).
- ▶ You likely believe that there's an urgency to our problems, and we must all work hard at a solution.
- ▶ You tend to speak in extremes and believe that political activism and corporate engagement are your best tools.
- ▶ Because you (likely) distrust large corporations, your investments are primarily in private business(es), real estate, or other non-traditional asset classes, or you want them to be.
- ▶ If you do invest in public companies, they have been negatively screened to eliminate what you consider to be harmful industries and companies.



POSITIVE INTENTIONS

Social and/or Environmental Transformation
Fairness and Equality
Having an Out-sized Impact

PAINFUL EMOTIONAL STATES

Skepticism
Disillusionment
Anger

ARCHETYPES THAT BALANCE THE IDEALIST

The Innocent

Simplicity, Trust,
Networks and Community

The Empire Builder

Innovation, Decisiveness,
and Optimism

The Star

Leadership by Example,
First-mover, Vocal

**Start aligning your
money with your values.**

[Schedule a Call](#)



8 FINANCIAL ARCHETYPES
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LIBERATING WISDOM AND CURATIVE MONEY MESSAGES

Practice saying these statements to yourself in a kind tone of voice:

- ▶ Money can be used for good: think of one example from your own or someone else's life and decide if you'd like to emulate or scale it.
- ▶ I will band together with other effective Idealists so that we can support and inspire one another.
- ▶ Compassion and efficacy increase when I'm not in a state of anger or rebelliousness.

Commonly Distorted Money Messages

Most extreme wealth has been created through others' suffering.

It's hopeless or too late.

No one is trustworthy, especially those motivated by money or personal gain.

PRACTICE FOR THE IDEALIST: THE SKEPTIC'S LENS

Activists, industry leaders, and creatives who operate under the Idealist archetype have a nose for hypocrisy, and often see very clearly and accurately the limitations of "the system" or ideologies in general. If you have the kind of critical mind that is adept at debunking myths, we challenge you to take that same skeptic's lens and use it to look at what you might not be seeing about your own relationship to money. Ask yourself: In what way is my relationship to money contradictory or even hypocritical?

If you're an Idealist with a substantial amount of money that you didn't earn, examine how your life would be different if you had earned the money yourself. Would your beliefs about money, or the way you treat it, be different?

If you had more money, imagine for a moment all the good you might do with it. Make a list of the ways money could better serve your ideals.