

[YOUR FINANCIAL ARCHETYPE]

The Innocent



POSITIVE INTENTIONS

Trust
Inspiration
Simplicity
Optimism

PAINFUL EMOTIONAL STATES

Resignations
Frustration
Helplessness
Overwhelm

ARCHETYPES THAT BALANCE THE INNOCENT

The Guardian

Alertness, Prudence, and
Thorough Analysis for Safety

The Empire Builder

Innovation, Decisiveness,
and Optimism

The Saver

Self-sufficiency and
a Secure Future

As an Innocent, you're optimistic, trusting and passionate. Inspiration is a key value for you, and your optimism can often be contagious. You're hopeful and adaptable, and you enjoy networks, trusting others with relative ease. However, you may also have some avoidance issues – and if you find yourself not paying close enough attention to warning signs, having teammates with a tendency to analyze things closely (Guardians, Savers, and Empire Builders) is very valuable for you.

Today, take one step to learn one more detail about your financial situation or a particular investment, or set up a schedule with a family member or your advisor(s) to review things in more detail than is customary for you.

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

- ▶ You'd rather get a root canal without anesthesia than balance your checkbook, pay your bills, or write down your expenses.
- ▶ You tend to be optimistic more often than pessimistic and may find it hard to separate good ideas from bad, or truly trustworthy people from charlatans.
- ▶ You're more interested in qualitative stories than quantitative metrics about your investments or charitable grants.

**We handle all the messy details so
you can focus on what matters most.**

[Schedule a Call](#)

The Innocent

LIBERATING WISDOM AND CURATIVE MONEY MESSAGES

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

- ▶ I am willing to patiently pay closer attention to my finances.
- ▶ I can simplify my lifestyle if needed to create self-sufficiency or align my money with my values.
- ▶ My optimism is a valuable attribute – but I need to combine it with pragmatism and prudence.

Commonly Distorted Money Messages

Money in and of itself, isn't very interesting to me.

There are so many great opportunities to do good with my money, it's hard to choose or create a system.

If I don't get mired in the details of my financial situation, life will be better.

PRACTICE FOR THE INNOCENT: USE YOUR NETWORK

Your optimism and trust are great assets, but if you avoid looking at the details (like many Innocents do), you're likely to miss important information around spending, investing, or giving. Here are a few things that may help you pay closer attention to the details:

- ▶ **Get a second opinion** on major financial decisions from a family member, advisor, or trusted friend who is a healthy version of the Guardian, Empire Builder or Saver (because they're naturally good at being cautious and detail oriented, visionary, and future-focused, respectively).
- ▶ **Spread your optimism:** volunteer for a non-profit board or consult with a company that could use your positivity and trust. Obviously, you should have some experience in their field, or be willing to study it, but if you're naturally inclined to see the glass as half-full, there are many organizations who could use your positive nature to help power their next phase of growth.
- ▶ **Make a bi-weekly date with yourself** to look at your finances and take one positive action. Review mint.com, Quicken, or some other system that easily tracks your spending and decide if anything needs to change in the coming fortnight. Look at your bank and investment account balances. Cross one important item off your financial to-do list (e.g. create a separate savings account for an important goal, set up automatic contributions to a retirement account, make a payment on your highest-interest rate credit card). If all this seems too daunting, enroll an ally for whom this comes more naturally (Guardian, Empire Builder or Saver).