

[YOUR FINANCIAL ARCHETYPE]

The Saver



POSITIVE INTENTIONS

Self-sufficiency
Security
Optionality

PAINFUL EMOTIONAL STATES

Fear
Depletion
Over-analyzing
Living in the Future

ARCHETYPES THAT BALANCE THE SAVER

The Pleasure Seeker

Enjoyment and Relaxation

The Idealist

Engaged and Active to Create Social
or Environmental Transformation

The Caretaker

Compassion and Empathy

As a Saver, self-sufficiency is a high priority for you, which is admirable. You seek security and sufficiency by accumulating or protecting financial assets. However, you can also be frugal, hoarding, or even obsessive about money. The risk is that you believe, unconsciously, that money truly can provide some kind of ultimate security. But it can't.

Today, try making generosity, relaxation or enjoyment of your life the highest priorities.

The deepest part of you doesn't care how much you have in the bank, although your values have a greater ability to be expressed when you feel secure.

You're probably a Saver if one or more of the following is true:

- ▶ You're future-focused and resistant to spend down your capital, even if spending down would be more consistent with your other values and goals.
- ▶ You're frugal, and love getting a good deal.
- ▶ As an investor, you aim for excellent investment returns and growth. If you need current income, you want to make sure your principal is growing over time.

Learn how you can further
maximize the value of
your saving strategies.

[Schedule a Call](#)

LIBERATING WISDOM AND CURATIVE MONEY MESSAGES

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

- ▶ Relaxing and enjoying my life is a high priority at least some of the time.
- ▶ Life is impermanent, I have enough to be okay, so how can I maximize the benefit my money can have?
- ▶ Sharing my skills & habits around saving could benefit many other people or organizations – is there someone who could use my help?

Commonly Distorted Money Messages

If I save enough, I'll be happy, safe, and secure.

I'm worried that I won't have enough.

People who spend or give "too much" are foolish.

PRACTICE FOR THE SAVER: PLEASURE AND GENEROSITY

Would you be more fulfilled over the long haul if you used less of your money for future accumulation, and more for spending on pleasurable purchases, like buying yourself time to do more of the things you love in life? How would it feel to give more generously, whether to charities, neighbors, friends, or family members in need?

Set aside some amount of money—\$1 a day or \$100,000 a month, whatever feels right to you given your financial and emotional situation—and spend half of it on sensual objects or experiences that bring you pleasure and fulfillment right now, in this moment. (Remember, the Saver loves to delay gratification.)

With the other half, be generous—either with outright charitable grants, gifts to loved ones, or concessionary impact investments. Put yourself in the recipient's

shoes and see if you can experience the same 'rush' of enjoyment you used to get from saving.

Expect that you're going to have some conflicts; you're going to feel nervous as you spend on yourself or practice generosity. Allow yourself to be nervous, and do it anyway, without over-thinking. Set this up automatically so you have less of an emotional battle each month as you work to change your habits. For example, have your bank or financial advisor automatically transfer your chosen amount into separate "play" and "generosity" accounts each month. Don't allow yourself to use these accounts for anything other than impact on others or spending that brings you sensory pleasure.

Does it feel uncomfortable as you try on these groundbreaking behaviors? Do it anyway!