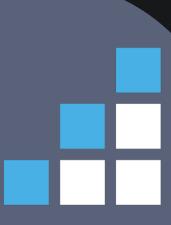
Passing The Financial Baton, But Still Investing Together

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How we think together and make investing a joint venture



MONEY MENTORSHIP

2. Understanding The Investor Self torship

1. Sparking Motivation

4 Legs of Mentorship

4. Action

3. Tools, Skills & Routines

Tunen

Simply listen carefully to one another. Good two-way communication is always necessary for mentorship to be effective.

A = Accept

Be flexible and understanding of the other person's financial inclinations and abilities.

D = Dignity

Don't judge the other person's behavior as good or bad; discuss their choices with respect, understanding, and patience.

S = Solution





What works when navigating family finance



What doesn't work when navigating family finance



Combing perspectives across generations



Let's Stay In Touch!

