Understanding Your (Financial) Identity
What is HEALING?

HEALTHY

LESS HEALTHY
WHAT IS THE BASIS OF YOUR IDENTITY???
Discerning Your Financial Archetypes

8 Financial Archetypes (from It’s Not About the Money by Brent Kessel)

- The **Guardian** is always alert and careful.
- The **Pleasure Seeker** prioritizes pleasure and enjoyment in the here and now.
- The **Idealist** places the greatest value on creativity, compassion, social justice, or spiritual growth.
- The **Saver** seeks security and abundance by accumulating more financial assets.
- The **Star** spends, invests, or gives to be recognized, feel hip or classy, or to increase self-esteem.
- The **Innocent** ignores financial matters; believes or hopes that life will work out for the best.
- The **Caretaker** gives and lends money to express compassion and generosity.
## Summary of Brent Kessel’s ‘Eight Money Archetypes’

<table>
<thead>
<tr>
<th>Archetype</th>
<th>Gifts</th>
<th>Pitfalls</th>
<th>Reactive states</th>
<th>Wrong Views</th>
<th>Creative Wisdom</th>
<th>Balancing archetypes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Guardian</td>
<td>Alert, prudent</td>
<td>Worry, anxiety</td>
<td>Fear and anxiety</td>
<td>It could all go wrong</td>
<td>Today I am going to pursue a calming activity that I love</td>
<td>Pleasure-seeker, Empire Builder, Innocent</td>
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<tr>
<td>Pleasure-seeker</td>
<td>Enjoyment, pleasure</td>
<td>Reckless, impulsive</td>
<td>Greedy, impatient</td>
<td>What I want and will enjoy is more important than what I might need</td>
<td>Living within my means and taking care of my future will create real pleasure for me and those I love</td>
<td>Guardian, Saver</td>
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<tr>
<td>Idealist</td>
<td>Vision, compassion</td>
<td>Distrust, aversion</td>
<td>Wary, angry</td>
<td>A lot of suffering and sacrifice is necessary to be creative or spiritual</td>
<td>Compassion comes more easily when I am not in a state of financial need or dependence</td>
<td>Saver, Innocent, Star</td>
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<tr>
<td>Saver</td>
<td>Self-sufficiency, abundance</td>
<td>Hoarding, penny-pinching</td>
<td>Obsessive, Futuristic</td>
<td>If I save enough I’ll be happy, safe and secure</td>
<td>My enjoyment and fulfillment is my highest priority today</td>
<td>Pleasure-seeker, Idealist, Caretaker</td>
</tr>
<tr>
<td>Star</td>
<td>Leadership, style</td>
<td>Pretentiousness, self-importance</td>
<td>Worthless, phony</td>
<td>Using money to feel classy, elegant, cool and hip will make me happy</td>
<td>It’s important that I use my money to nourish all parts of me, incl. my wish to help others</td>
<td>Guardian, Caretaker, Idealist</td>
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<tr>
<td>Innocent</td>
<td>Hope, adaptability</td>
<td>Avoidance, helplessness</td>
<td>Overwhelmed, Helpless</td>
<td>If I don’t look at my financial situation, I won’t feel the pain, and somehow my situation will get better.</td>
<td>I can find a vocation that I enjoy and am passionate about that will bring me enough income.</td>
<td>Empire Builder, Guardian, Saver</td>
</tr>
<tr>
<td>Caretaker</td>
<td>Empathy, generosity</td>
<td>Self-abandoning</td>
<td>Overburdened, Angry</td>
<td>They couldn’t make it without me</td>
<td>I cannot effectively help others unless I’m taking good care of myself</td>
<td>Innocent, Pleasure Seeker, Saver</td>
</tr>
<tr>
<td>Empire Builder</td>
<td>Innovation, decisiveness</td>
<td>Greed, domination</td>
<td>Insatiable, Insecure</td>
<td>Once I have ..., I’ll be happy</td>
<td>I have enough today to enjoy my life fully</td>
<td>Pleasure Seeker, Idealist</td>
</tr>
</tbody>
</table>
Save $1000 faster than you think!

1. Create a budget
2. Avoid dining out
3. Stash all $1s, $5s, and change
4. Collect (bottles, old loans)
5. Sell your stuff
6. Cash out whole life policies and switch to term
7. Overtime; Part-time job
8. Shop for better deals on life, auto, home, health insurances, etc.
9. Use tax refund
10. Use cash only