

# How to Be *Money Smart*

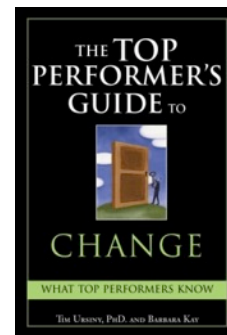
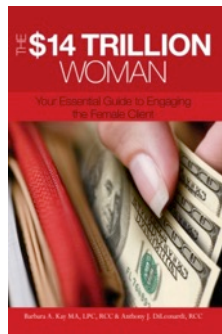
*Partial Sample of Client Event Presentation*

BARBARA KAY COACHING 



# Barbara Kay Coaching

Productivity  
Teams  
Clients  
Change  
Leadership



Professionally trained in Clinical Psychology and Coaching, publications include journal articles and two books: *The Top Performer's Guide to Change* and *The \$14 Trillion Woman: Your Essential Guide to Engaging the Female Client*.

Barbara works with:

Individuals  
Leaders  
Teams  
Organizations  
Industry Partners





# People are Funny about \$\$





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# Agenda

1. Money Style
2. Money Emotions
3. Money Support





# What is Your Money Style?





# Your Money Style Strengths





# Your Money Style Challenges





# Your Money Style Solutions





# Money Emotions



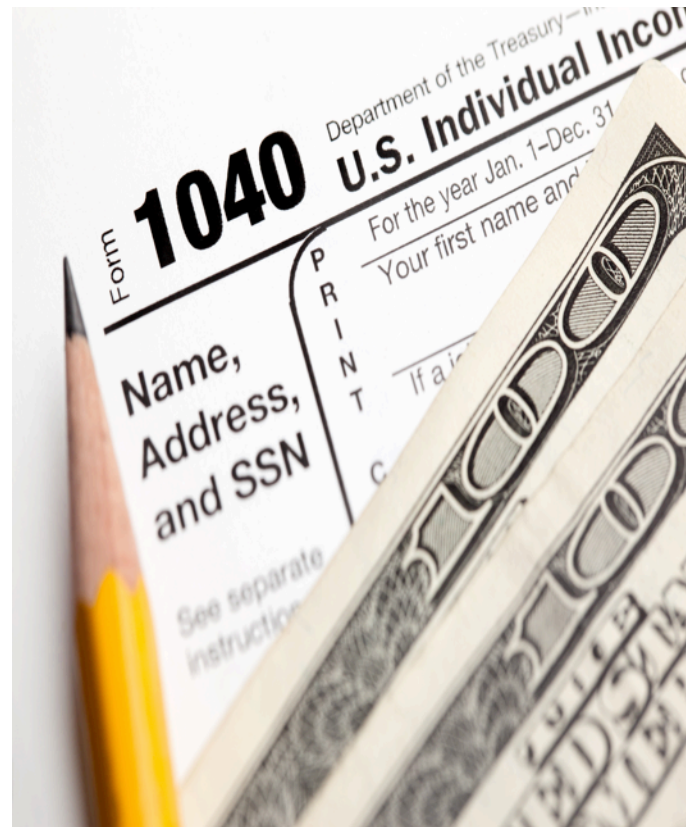
1. Mental Accounting
2. Anchoring
3. Media Triple Threat



# Mental Accounting



“Free” Money



“Earned” Money



# Anchoring



LA \$100K, Miami \$91K, Chicago \$47K



# Media Triple Threat





# Value of Advice



## More on Track

77% of women w/out an Advisor are behind

## More Confident

64% w/ an Advisor confident vs. reward (41%)

## More Invest More

Use more financial tools & save more \$\$

## More Value

Women report high value from advice



# Final Thoughts

- ✧ Work with your Money Style
- ✧ Beware Emotional Traps
- ✧ Partner w/ an Advisor
- ✧ Enjoy Support

*Because....*





# People are Funny about \$\$





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