



Money & Mindset

Legacy Rose Company, LLC

The money mindset.

- We are the sum of our experiences, and this extends to our experience with money as well. Based on our exposure over the years from childhood to adulthood, how we were exposed to finances and money have influenced us.
- It has influenced the way we think, interact, and how we make decisions concerning money.
- This is known as the money mindset...the sum of conscious and unconscious deposits of information along the way. **A money mindset is an overriding attitude that you have about your finances.**





A Negative Mindset...

A negative money mindset can show up as fear, intimidation or procrastination.

It may manifest as an inability (fear) to make large financial purchases without input from trusted friends and family as well as detailed research.

Now, there is nothing wrong with seeking the opinion of those we trust or being fully informed, however, if this has caused you to regret not buying that investment, not investing in your company's 401k, afraid to open a bank account etc. it is negatively impacting you.



A Positive Mindset...

- ▶ A positive mindset towards money on the other hand, gives us confidence.
- ▶ We tend to look for opportunities instead of seeing roadblocks at every turn.
- ▶ We begin to operate from the mindset of ‘if there is a will, there is a way,’ a much more empowering place.
- ▶ We can recognize that every financial situation is fixable and accept that even small steps add up to progress, even it is slow.
- ▶ This assuredness lets us see the value in asking or seeking help instead of suffering in silence.

Positive Mindset Cont'd

► Having a positive mindset towards money is more beneficial especially when it comes to building our investment strategy. We cannot fear or be intimidated by the tool (money) we need to help us reach our goals, change our financial situation, and build a legacy.

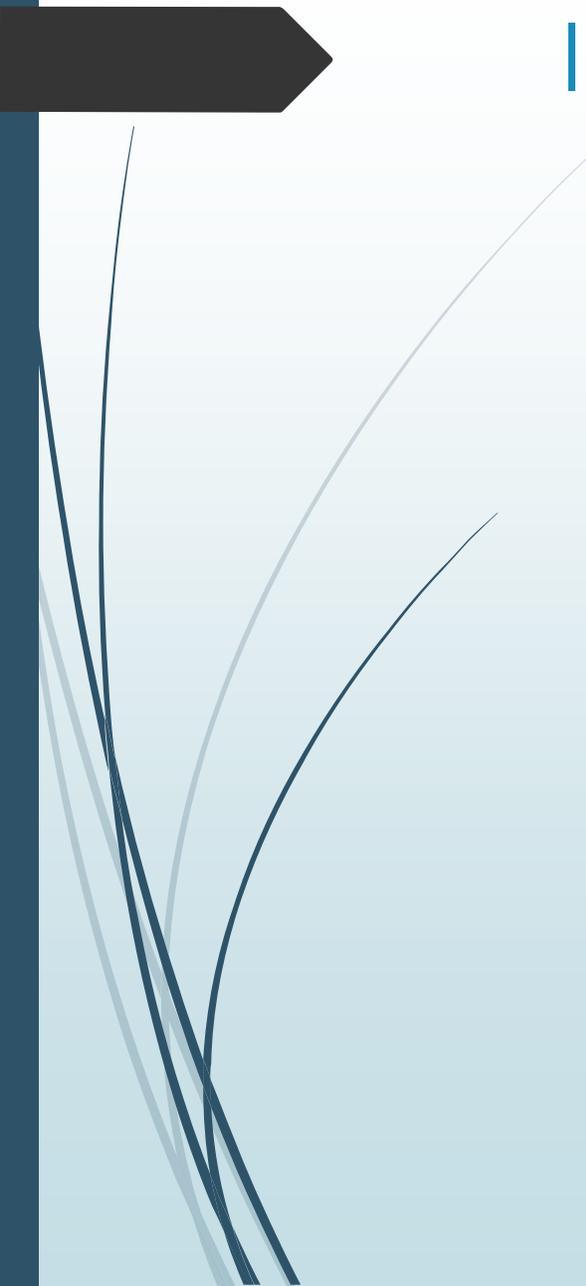




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Risk Tolerance

It is important to understand where you are in the money mindset flowchart. This will give you an understanding of your risk tolerance and help you develop the right investment strategy for you.

A dark blue arrow points to the right from the left edge of the slide. Below it, several thin, curved lines in shades of blue and grey sweep across the left side of the slide.

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Thank you for taking this course!