

The Financial Mindset Fix:

Mental Health for Financial Wealth



Exercise 1:

Create a Personal & Professional Advisory Board (10 minutes)

An advisory board is a group of people that provides advice to a company. We could all use both a personal and professional advisory board to keep us on track.

My personal advisory board (which advises me when I have personal dilemmas) consists of my husband, best friends, sisters, mentor, therapist and spiritual advisor.

My professional advisory board (which advises me on professional and financial matters) includes my mentor/clinical consultant, accountant, attorney, media coach, and financial planner. In your journal, answer the following:

- Who is on your personal board of advisors? List at least three people.
- Who is on your professional board of advisors? List at least three people.
- Is there anybody on these lists who you think maybe needs to be reevaluated?
- Is there somebody who needs to be added? How can you find such a person?

Now write two or three sentences about the last time you could have used more help or support.

- How would the experience be different if you had it?
- Who on your advisory boards could you ask to help you next time?

Continuing to cultivate and utilize your advisory boards takes ongoing attention and practice.

Congratulations for being on your way to regularly benefiting from wise counsel.