## The CentreArchitect Community ANNUAL MEETING

The International Conference for Small Firm Entrepreneur Architects

Austin, Texas · November 1-3, 2022

With support from Monograph

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## **Build Your Mental Wealth**

How Improving Your Mental Health Can Promote Financial Wealth



**Joyce Marter** 



https://qrco.de/bdPaww

## Handouts

joyce-marter.com



I am a financial planner, not a psychiatrist, but I do know that your net worth will rise to meet your selfworth only if your selfworth rises to accept what can be yours.

SUZE ORMAN, author of ten consecutive New York Times best sellers about personal finance

## The Psychology of Money

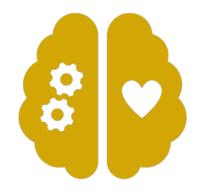
- Feelings of worthiness
- Thoughts about money
- Emotions around money
- Behaviors with money
- Relationship with money
- Financial relationships with others





## My Money Story





### The intrinsic relationship between mental health & financial health



# Stressors of the Pandemic

- Concerns for health & safety of self & others
- Adjustments to working differently
- Less social support and community
- Dependent care—work-life balance challenges
- Financial fears & stress
- Racial injustice issues coming to the forefront
- Political divide and unrest
- Challenges managing uncertainty and change



## **Reintegration Challenges**

- Health anxiety
- Social anxiety
- Workload
- Office reintegration
- Clinical and functional burnout
- Great Resignation and Quiet Quitting



#### **Joyce Marter**

## Mental Health Implications

- Grief and loss
- Increase in stress, anxiety and depression
- Increase in substance abuse
- Relationship conflict, abuse, violence
- PTSD/Trauma
- Increase in suicide rates

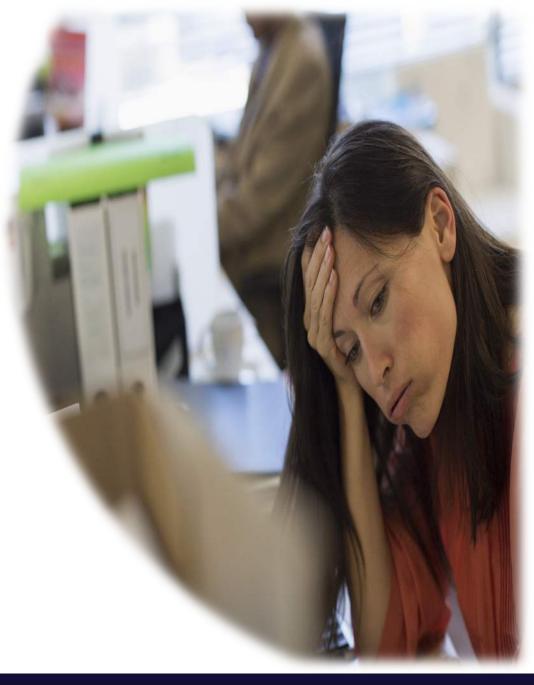


#### **Joyce Marter**

23% of adults and 36% of millennials experience financial stress at levels that qualify as a diagnosis of PTSD.

## **Financial Traumas**

- Racism, discrimination, marginalization
- Poverty
- Unemployment
- Business closing
- Foreclosure, short sale
- Bankruptcy
- Theft
- Lawsuit
- Divorce, breakup
- Unexpected healthcare expenses







Financial distress accounts for 16 percent of suicides in the US and correlates with lower life satisfaction.

## Mental Health Continuum

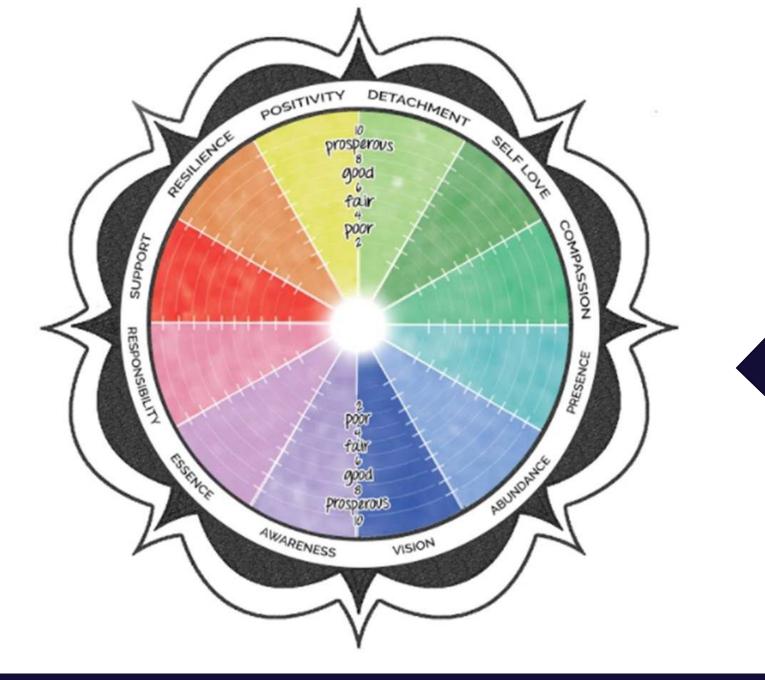


#### **Joyce Marter**

We unconsciously recreate the familiar until we become aware, and we choose something better.



#### **Joyce Marter**



## Twelve Mindsets for Success



## #1 Abundance

"Long-lasting and pronounced success comes to those who renew their commitment to a mindset of abundance every minute of every hour of every day."

- Bryant McGill, Author & Human Potential Thought Leader



### Scarcity vs Abundance

- Can be caused by fear
- Competing for available resources
- Rooted in limiting beliefs
- Focused on what you don't have

- Can be a result of gratitude
- Not competition involved
- Rooted in believing there is enough for everybody
- Focused on believing in yourself



## An Abundance Mindset Facilitates:

- Creativity
- Positivity and possibility
- Hope
- Openness
- Flexibility
- Empowerment
- Problem-solving
- Growth and expansion
- Collaboration



## **#2 Self-Awareness**

"He who knows others is wise. He who knows himself is enlightened."

- Lao Tzu





Is Your Unconscious Robbing You of Riches?

What You Don't Know Will Hurt You







## **#3 Responsibility**

"Everything you do is based on the choices you make. It's not your parents, your past relationships, your job, the economy, the weather, an argument or your age that is to blame. You and only you are responsible for every decision and choice you make."

- Wayne Dyer, The Power of Intention



#### **Joyce Marter**

Success begins with an awakening, an honoring of the past for how it has shaped & molded us, and a choice to take responsibility for our path going forward.



#### Joyce Marter

## **Financial Literacy**

- Budgeting
- Banking
- Investing
- Reading financial statements and reports
- Understanding interest
- Understanding pros and cons of financial products including insurance



## **Improve Your Financial Relationships**



Set Financial Boundaries with Assertiveness

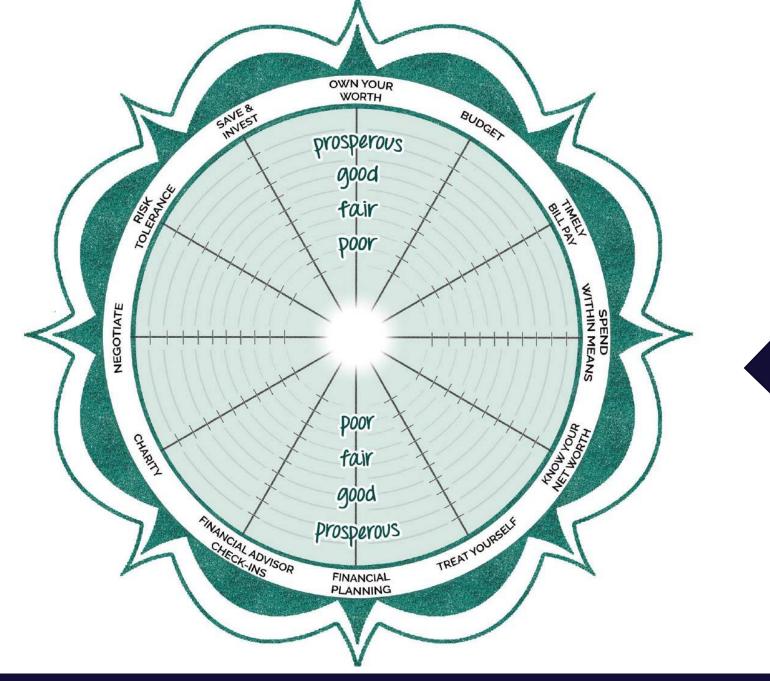


Be Aware of Financial Infidelity

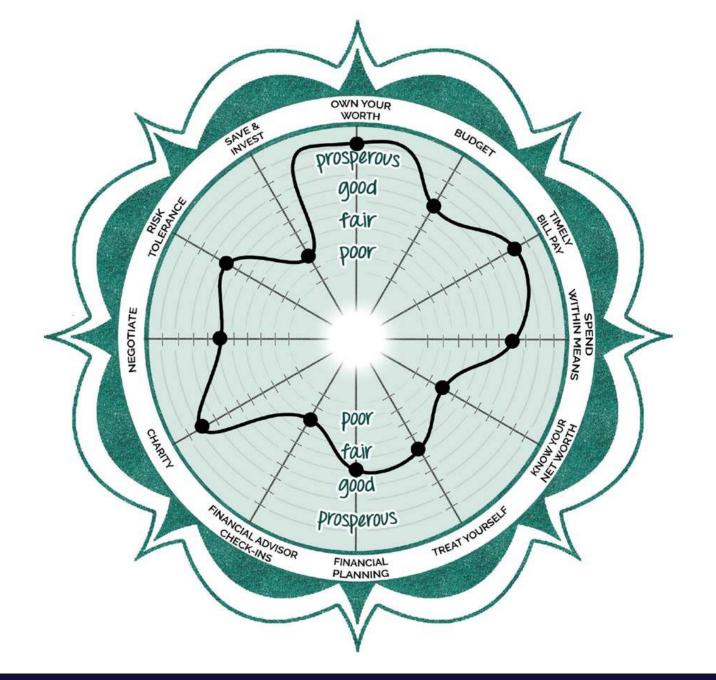


Understand the Role of Financial Codependency





## The Financial Health Wheel



Sample Completed Financial Health Wheel

## **#4 Presence**

"Be as least as interested in what goes on inside you as what happens outside. If you get the inside right, the outside will fall into place."

- Eckhart Tolle, The Power of Now



## Apply Mindfulness to Finance

- Save and spend mindfully
- Tap into your intuition when negotiating or making financial decisions
- Respond consciously rather than
  react emotionally



**Joyce Marter** 



A story about Penny & Prosperity







### "Whenever you feel superior or inferior to anyone, that is the ego in you."

-Eckhart Tolle





Healthy self-esteem is midway between Diva and Doormat

# Ego & Money

- Detach from ego
- Align with purpose
- Imposter syndrome & perfectionism
- Embrace enoughness

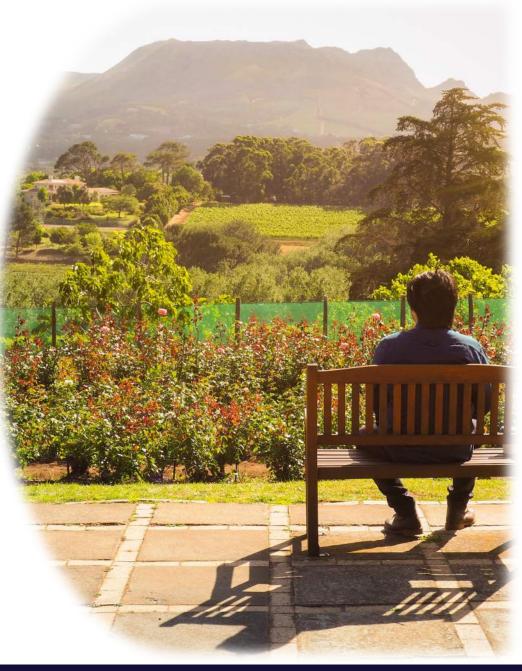


### **Joyce Marter**

# **Discover** Your Worth

### And See We are All Beggars on a Golden Bench

What's your golden bench?



**Joyce Marter** 

# **#6 Self-Love**

"You can search throughout the entire universe for somebody who is more deserving of your love and affection than you are yourself, and that person is not to be found anywhere. You yourself, as much as anybody in the entire universe, deserve your love and affection."

- Buddha



You must care enough about yourself to welcome the life that you deserve.

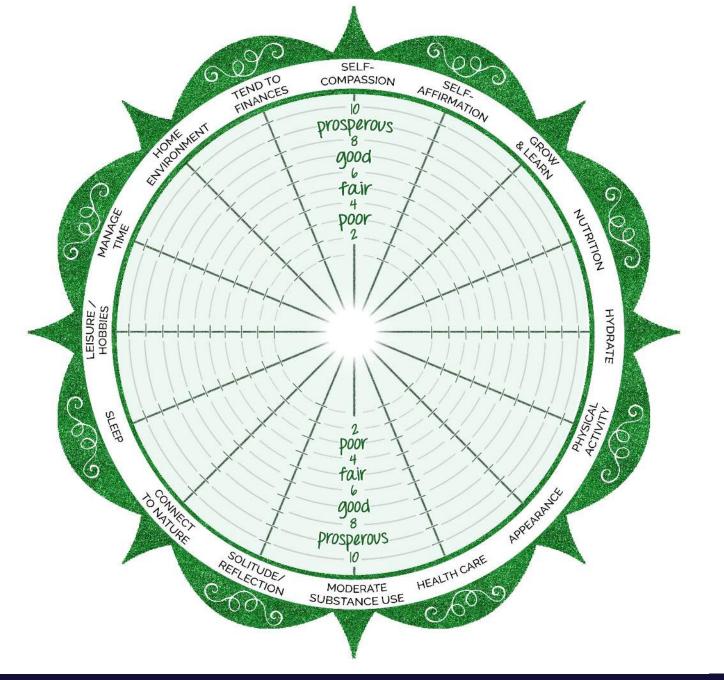


### **Joyce Marter**

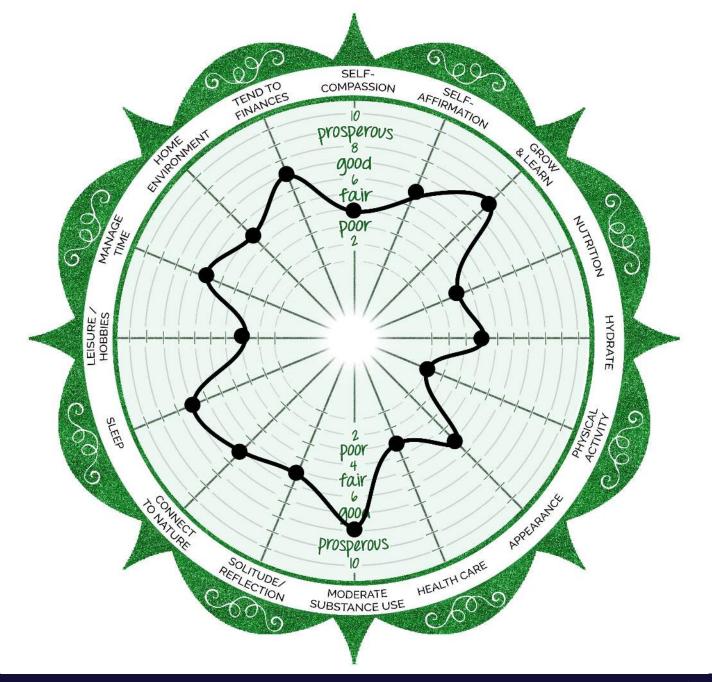
Having a healthy relationship with yourself is essential for happiness. Choose to be your own good parent, best friend, and greatest advocate.



### **Joyce Marter**



# Self-Love Wheel



### Sample Completed Self-Love Wheel

# **#7 Support**

### "Alone we can do so little, together we can do so much."

- Helen Keller





# **Barriers to Accessing Support**

- Fear (difficulty trusting)
- Pride
- Shame or stigma
- Guilt
- Fear of imposition
- Low self-esteem, not feeling deserving
- Learned helplessness

- Hopelessness
- Loss of power and control (ego)
- Loss of credit (ego)
- Early life messages
- Expense
- Introversion or shyness
- Trauma

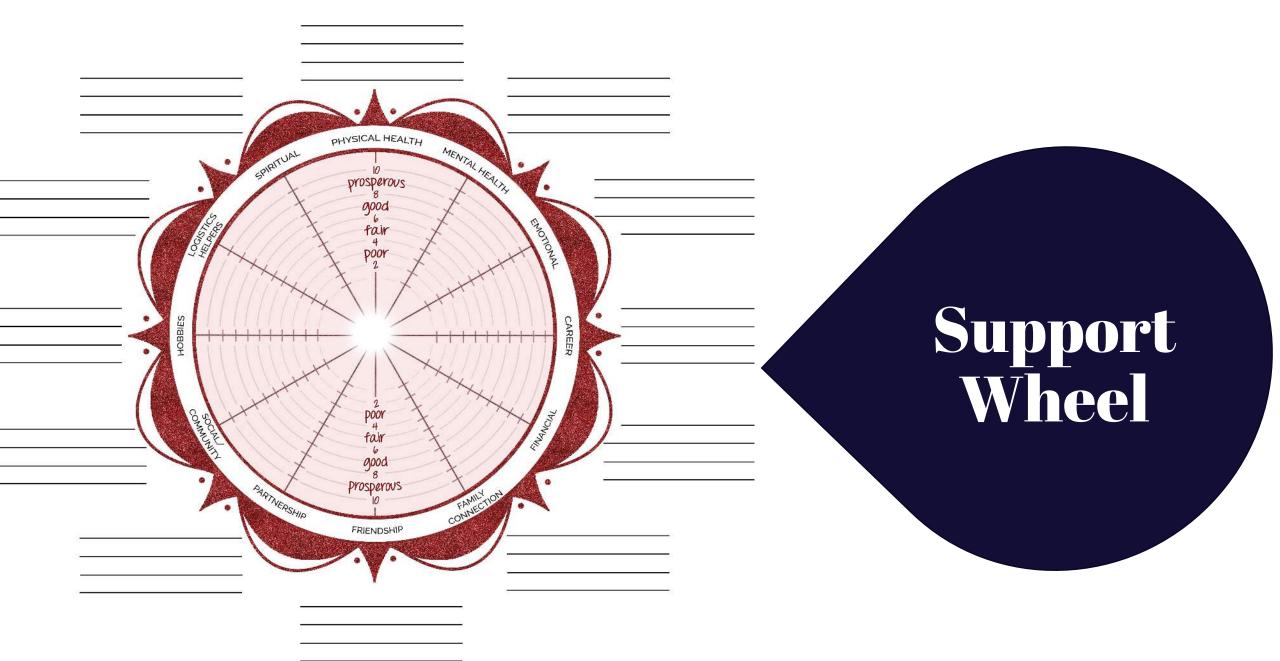


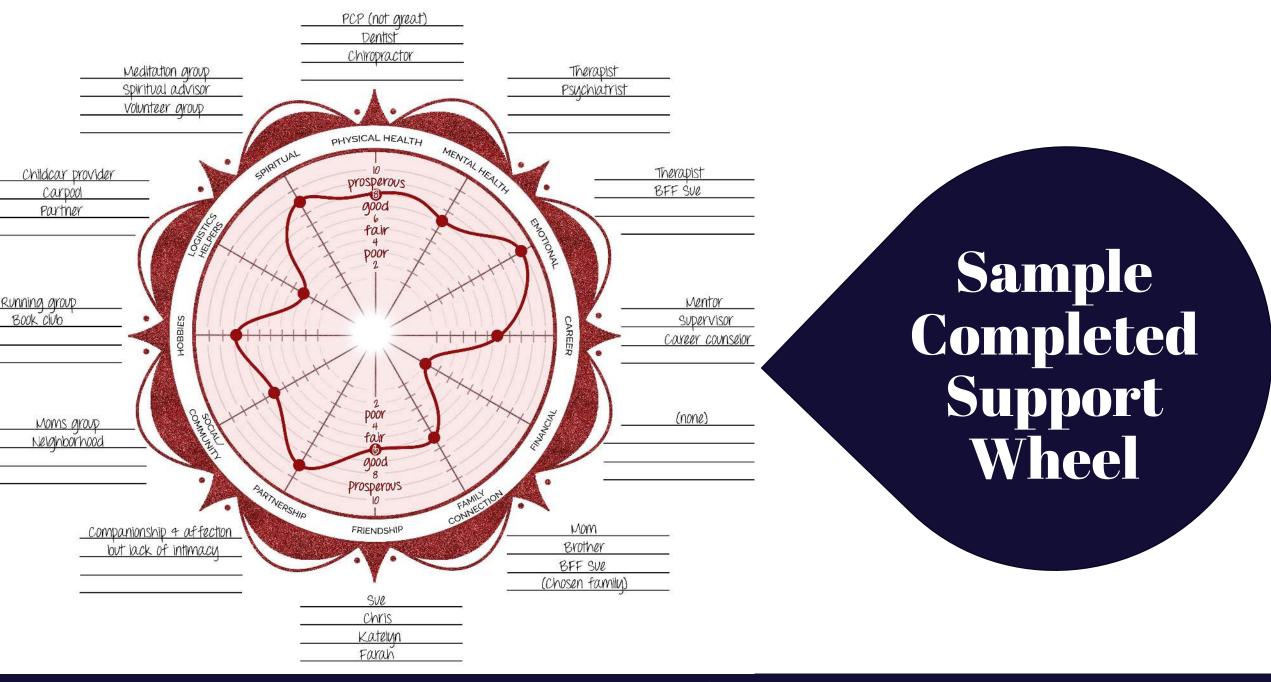


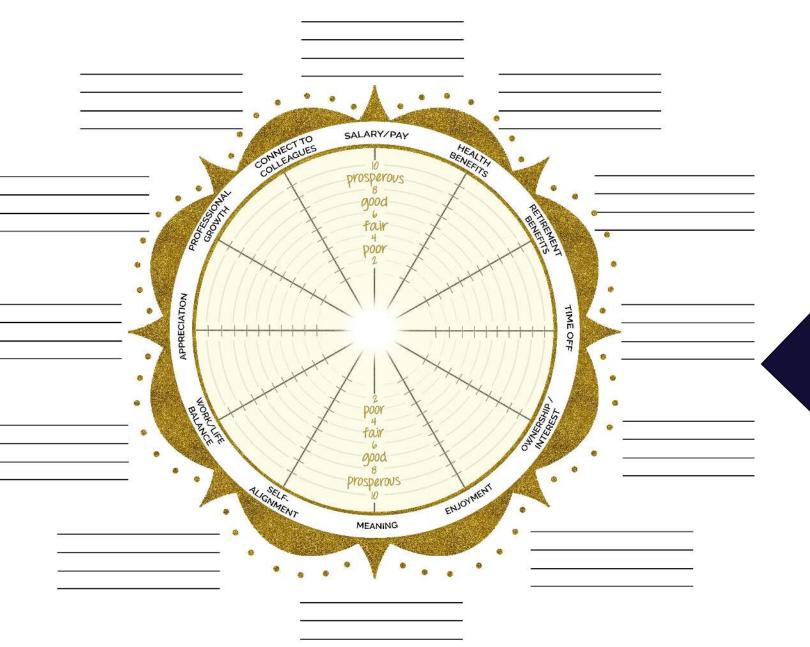
### **Create a Financial Board of Advisors**

- Financial Planner
- Accountant
- Attorney
- Accountability Partner
- Counselor, Therapist or Coach
- 12-Step Support: Debtors Anonymous,
- Underearners Anonymous, Spenders Anonymous

### **Joyce Marter**







### Workplace Satisfaction Wheel

# **#8 Compassion**

"I've learned that people will forget what you said, people will forget what you did, but people will never forget how you made them feel."

- Maya Angelou



### **Joyce Marter**

FEATURED ON LIVE BOLDLY





# Love is the currency of life

lion mit con

## **#9 Vision**

"First say to yourself what you would be; and then do what you have to do."

- Epictetus





# **Envisioning & Planning**

- Participate in Career Counseling
   or Coaching
- Leverage Professional Association Membership
- Utilize Mentoring
- Create a Vision Board
- Write Out a 1-3-5 Year Plan
- Prioritize work/life balance



# **#10 Positivity**

"A man is but the product of his thoughts...what he thinks, he becomes."

- Mohandas Gandhi



### **Joyce Marter**



When you refuse to believe something is impossible, it becomes possible.







# Change Your Language

- "I don't" to "I do"
- "I won't" to **"I will"**
- "I can't" to "I can"
- "I'm not" to **"I am"**



SITUATION	THOUGHT	EMOTION	BEHAVIOR	ALTERNATE THOUGHT
Your coworker received the promotion instead of you.	"I suck."	Anger, sadness, shame	Sulky and passive- aggressive	"There will be a better opportunity for me in the future."

# **Embrace the Power** of Negotiation

- Everything is negotiable:
  - Contracts with contractors and service providers
  - Leases
  - Purchases
- Look for win-win
  - Solving problems



### **Joyce Marter**

# **#10 Detachment**

"Feelings are waves of energy which we can choose to surf, rather than allowing them to overcome us."

- Arlene Englander





# **Detach From:**

- Your own negative emotions like fear, anxiety, anger and sadness
- The negative emotions of others
- Expectations
- Outcome (embrace uncertainty)
- Risk

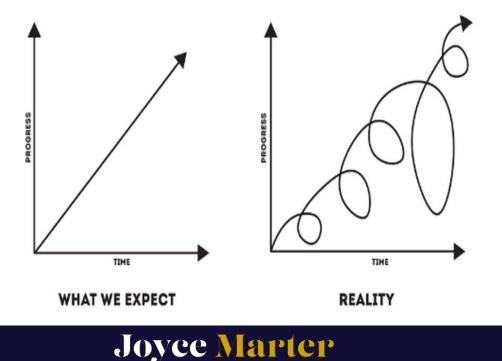


### **Joyce Marter**

### **#12 Resilience**

"Life will give you whatever experience is most helpful for the evolution of your consciousness."

- Eckhart Tolle











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Resilience is the ability to fully engage in life, recover from challenges, and increase the capacity to thrive in the future.



SUCCESS is to live openly, authentically, & lovingly in alignment with the highest good of self & others – to the greatest extent possible." Joyce Marter joyce-marter.com



# Thank You!

www.joyce-marter.com joyce@joyce-marter.com





Joyce Marter

Joyce Marter



Joyce.Marter



JoyceMarterLCPC

Joyce\_Marter

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