

Money Made New: The Big Picture
Money Details and What's Really "Enough"?

Workshop Outline – Organizational Presentation

1. Session 1 – “What Brings us Together?” 8:00 to 8:30 AM

- Introductions
- Song – “Late for Your Life” – Mary Chapin Carpenter
- What Money Can and Can't Do
- Poem – “Everything is Waiting for You” - David Whyte

2. Session 2 – “Money Hazards – Within and Without” 8:30 to 10:00

- Internal Hazards – A Thousand Voices Drowning Out Your Voice.
Review of Worksheet 1 – “Money: Your One Voice or a Thousand Others?”
- External Hazards – Money Myths We've Come to Believe
Review of 4 Financial Myths – Chapter 4
- Avoiding Hazards through Money Attentiveness
- Money Made New – Information Coupled with Intuition

Break: 10:00 – 10:15

3. Session 3 – “Where My Money Goes and What's “Enough?” 10:15-12:00

- Song – “Gaia” – James Taylor
- Review of “The What's Enough?” Worksheet
- Review of the *Self-Sufficiency Standard for Your State 2004: A Family Needs Budget*

Lunch: 12:00-12:30

4. Session 4 – “Am I Saving Enough to Retire?” 12:30-2:30

- Review of “Am I Saving Enough to Retire?” Worksheet
- Investing Pitfalls Avoided – “Investment Attentiveness 101”
- Update the “Enough” Budget with Calculated Retirement Savings
- The Ship of Money Transformation – the Budget
- Session Summary

Break: 2:30-2:45

5. Session 5– Money Made New – Sustaining Money Attentiveness 2:45
– 4:15

- Song – “The Things We’ve Handed Down” – Marc Cohn
- The 4 Steps of Transformation
- “Practice is Perfect”
- Document Organization – 3 Binders
- A Routine of Money Attentiveness
- A Financial Plan that Breathes
- The Changing Shape of Your Own Identity

6. Workshop Evaluation – 4:15 to 4:30