



# Facilitating Money Mindset Cards Virtually

## About Money Mindset Cards

Money Mindset Cards are a set of 30 dialogue-based activity cards that help staff facilitate conversations that allow their participants to develop their own path to financial well-being.

To build awareness of our mindsets when it comes to the culture of money, we must talk about money early and often. Dialogue generated by Money Mindset Cards inspires clearer goals and meaning when it comes to money, builds healthy identities with financial wellness, and creates intention for the financial future that participants want.

Greater desire and self-awareness about our money mindset leads to increased financial fulfillment and action. When people raise their awareness, they access more of their own personal power and make intentional choices that support their financial wellbeing.

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Money Mindset Cards were developed for in-person group or individual coaching but can be applied well in an online forum, one-on-one coaching call, or a group coaching call with simple additions to steps on each card.

Follow these instructions to facilitate Money Mindset Cards within virtual conversations:

1. Review the Money Mindset Facilitator tips:
  - Listen with Intention Pay attention to those who are speaking, without thinking, mind-wandering, or holding on to an agenda. Focus less on their words but instead listen deeper to hear their emotions, strengths, beliefs, and motivations.
  - Focus on Strengths Direct the conversation towards what is possible, what is working well, and where each person's strengths and resiliencies are.
  - Share Your Own Journey Share your relationship with money, or an example you've observed, to show that we've all had setbacks and successes when it comes to finances.
  - Ask Questions Ask questions, sit in silence, and suspend judgement. Try to follow-up with participants by saying: "tell me more," "that's interesting," "why would you say that," "help me understand."
  - Build on Ideas Brainstorming helps encourage quantity and the opportunity to build on other's ideas, thoughts, and reflections. It is powerful when participants generate and build a vision together.





2. Generate a dialogue one-on-one or in a group:
  - **Online Forum** If you are using an online forum, copy the link to the Money Mindset Card and post it to the forum. Invite participants to 1) Answer one or more of the coaching questions and 2) respond to at least one other participant on the forum.
  - **One-on-One Coaching Call** If you are doing an one-on-one coaching call, follow the step-by-step instructions on the back of each card to complete the activity with the participant. If possible, share a link to the card to be viewed onscreen. Suggest that participants have a pen and paper on hand. Use the coaching questions to facilitate a discussion.
  - **Group Coaching Call** If you are doing a group coaching call, follow the step-by-step instructions on the back of each card to guide your group through an activity. If possible, share a link to the card to be viewed onscreen. Suggest that participants have a pen and paper on hand. Use the coaching questions to facilitate a discussion.
3. Use the helpful hints on each card to make the most of your conversation.