

Accountants | Finance & Lending | Financial Planners | Investment Management



Financial Services



Finance



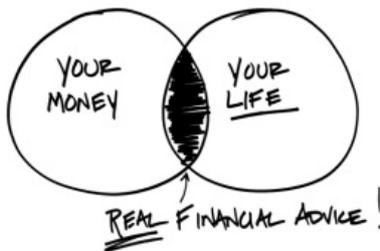
Financial Planning



Investment Management

Want to stop arguing about money?

Money is important, working its way into every aspect of your life



My role as a Financial Adviser is to help my clients make smart decisions about money.

Real Financial Advice is about 3 things:

1. Knowing yourself
2. Knowing about your money
3. Genuine partnership with a trusted Financial Adviser

One of the tools I use is the Money Personality Questionnaire.

Knowing your Money Personality helps you work well with the people most important to you.

It also helps you protect, build and manage wealth.

Benefits for you

- Know yourself and understand others
- Better communication
- Uncover your strengths
- Stronger relationships
- Less stress
- Greater awareness
- Empowering Memorable
- Lasting 'Ah-Ha' moments

About Money Personality

- It's an online quiz based on Behavioural Finance and Psychology
- It can be a valuable tool
- It's an innovative, insightful and memorable way to understand your wealth creation preferences.

Money Personality will **reveal how you relate to money** and finance, and how very **different people can work together**.

Our money personalities underlie virtually all decisions we make regarding money, career, business and investment, and perhaps more importantly, how we feel about it.

Interestingly, all personality types can do well with money, so long as they understand their strengths and weaknesses.

After taking the Money Personality Questionnaire you will get a detailed report that identifies your Money Personality animal.

The Animals and their personalities are:

 <p>Dolphin</p>	<p>People with Dolphin preferences like harmony, peace and purpose. Dolphins are more interested in "what could be" than "what is". The Dolphins core needs are possibility, purpose and authenticity. Oprah Winfrey displays Dolphin preferences.</p>
 <p>Owl</p>	<p>People with Owl preferences like knowledge, possibility and analysis. Like the Dolphins, Owls are more interested in "what could be" than "what is". The core needs of Owls are competence, possibility and maximising opportunities. Bill Gates displays Owl preferences.</p>
 <p>Monkey</p>	<p>People with Monkey preferences like spontaneity and flexibility. They act on their impulses and find highly structured plans and situations restricting. Monkeys like to take advantage of new opportunities quickly. Donald Trump displays Monkey preferences.</p>
 <p>Labrador</p>	<p>People with Labrador preferences like order, closure and stability. They excel in managing and maintaining proven structures and systems. Labrador's core needs are loyalty, responsibility, and belonging. Warren Buffett displays Labrador preferences</p>

To take the Money Personality Questionnaire email me Sheila@carnegiefin.com.au