

EMOTIONAL

FINANCE



**Relationships are the
differentiator**

Portfolios. Pensions.
Technical Expertise

=

COMMODITY

Relationships

=

PRODUCT

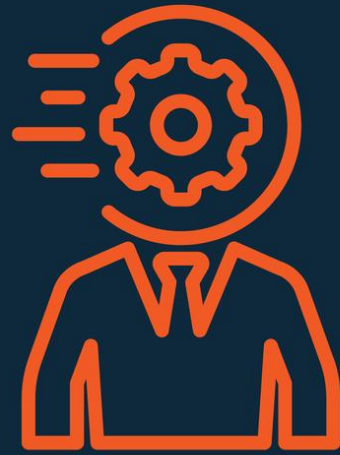
GOOD INTENTIONS

INFORMAL

INSTINCTIVE

INVISIBLE

3 ARCHETYPES:



WIZARDS

Technically Brilliant

Less confident with emotions and tricky dynamics

Trapping value in the commodity



BEST MATES

Well loved

Using friendship as a proxy for connection

Hard to justify fee



QUASI THERAPISTS

Deeply empathic

Struggle with boundaries and action orientation

Value is in a relationship not trained to offer

The way out of these defaults...

INFORMAL



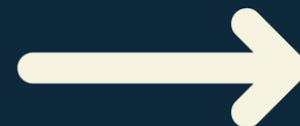
RIGOROUS

INSTINCTIVE



CULTIVATED

INVISIBLE



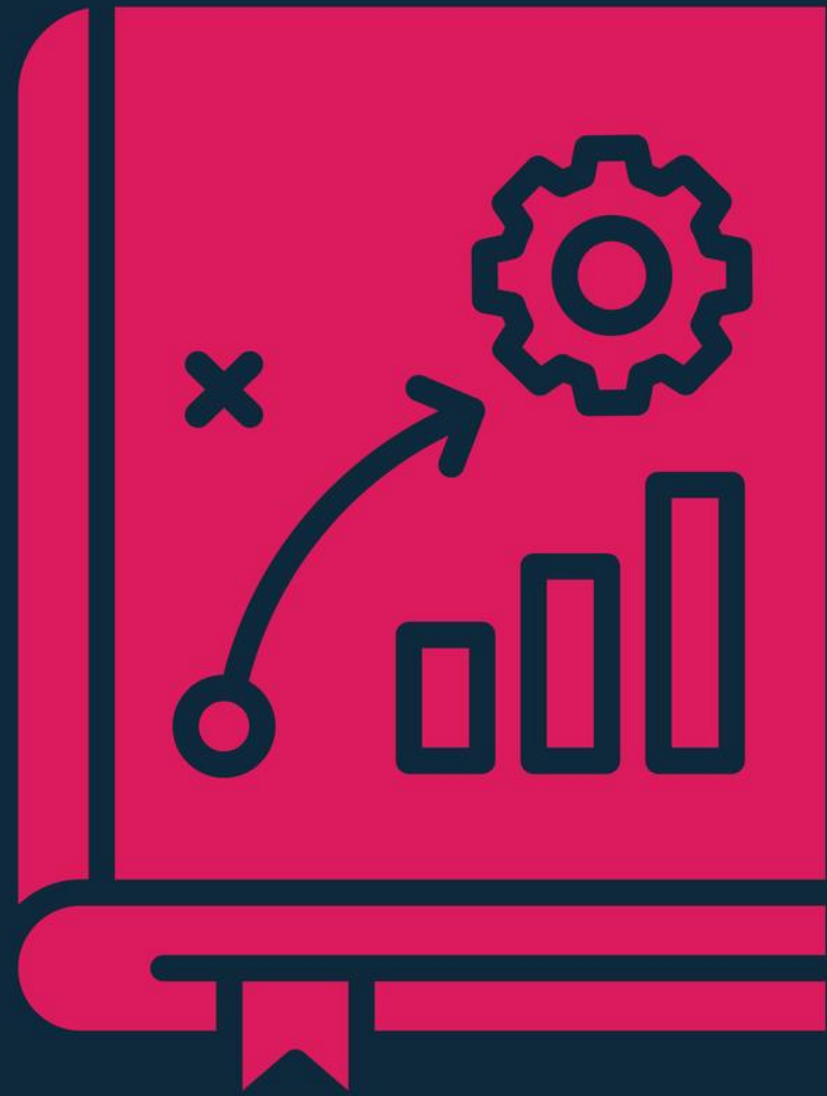
TANGIBLE

WELL
INTENTIONED
RELATIONSHIPS

The diagram consists of two rounded rectangular boxes on a dark blue background. The left box is light yellow and contains an orange rounded rectangle with the text 'WELL INTENTIONED RELATIONSHIPS' in white. A white arrow points from this box to the right box. The right box is also light yellow and contains a pink rounded rectangle with the text 'WELL EXECUTED RELATIONSHIPS' in white.



WELL
EXECUTED
RELATIONSHIPS



Psychotherapy Playbook

Can't Guarantee Outcomes

Relationship *is* the Work

Relationship Methodology



WELL EXECUTED
RELATIONSHIPS

=

3 BUILDING
BLOCKS

3 BUILDING BLOCKS

TRUST



CONNECTION



COLLABORATION



RIGOUR

CULTIVATE

TANGIBLE

Starting point is intention

Which archetype resonates?

Take relational notes



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