

Health, Wealth, & Wisdom

Do what you love without a second thought

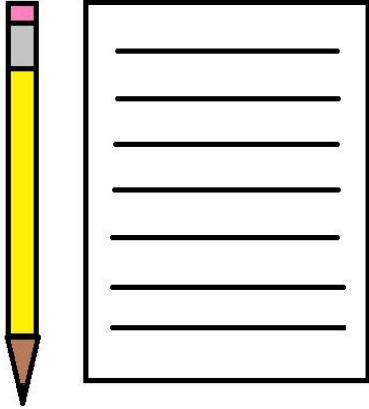


NACHW
NATIONAL ASSOCIATION OF
COMMUNITY HEALTH WORKERS



UNITY
CONFERENCE 2021
& ANNUAL MEETING

Before we get started ...



Have a pencil and paper handy!



Text [thebeans](#) to 22333

-or-

Open pollev.com/thebeans

SIMPLIFY THE PATH TO

Money + Life Balance

POLL

Last month, how many days did
you think about money?



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Last month, how many days did you think about money?

0 Days

1-10 Days

11-20 days

20-29 days

Most or all days



YOUR STORY

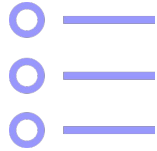
Money Narratives

CHAT

How does your life story impact
how you think and feel about money?



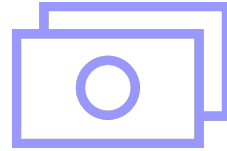
Principles of Money + Life Balance



1 Have a plan.



2 Have some savings.



3 Spend according to your values.

¹ Rogers, Todd, Katherine L. Milkman, Leslie John, and Michael I. Norton, "Making the Best Laid Plans Better: How Plan-Making Increases Follow-Through." Behavioral Science and Policy (2016).

² Nathan C. Pettit and Niro Sivanathan, "The Plastic Trap: Self-Threat Drives Credit Usage and Status Consumption." Social Psychological and Personality Science (2010).

³ Sandra C. Matz, Joe J. Gladstone, and David Stillwell, "Money Buys Happiness When Spending Fits Our Personality." Psychological Science (2016).

YOUR PLAN

Visual Financial Planning

POLL

I have a financial plan or a cash flow plan that I use today.



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I have a financial plan or cash flow plan I use today.

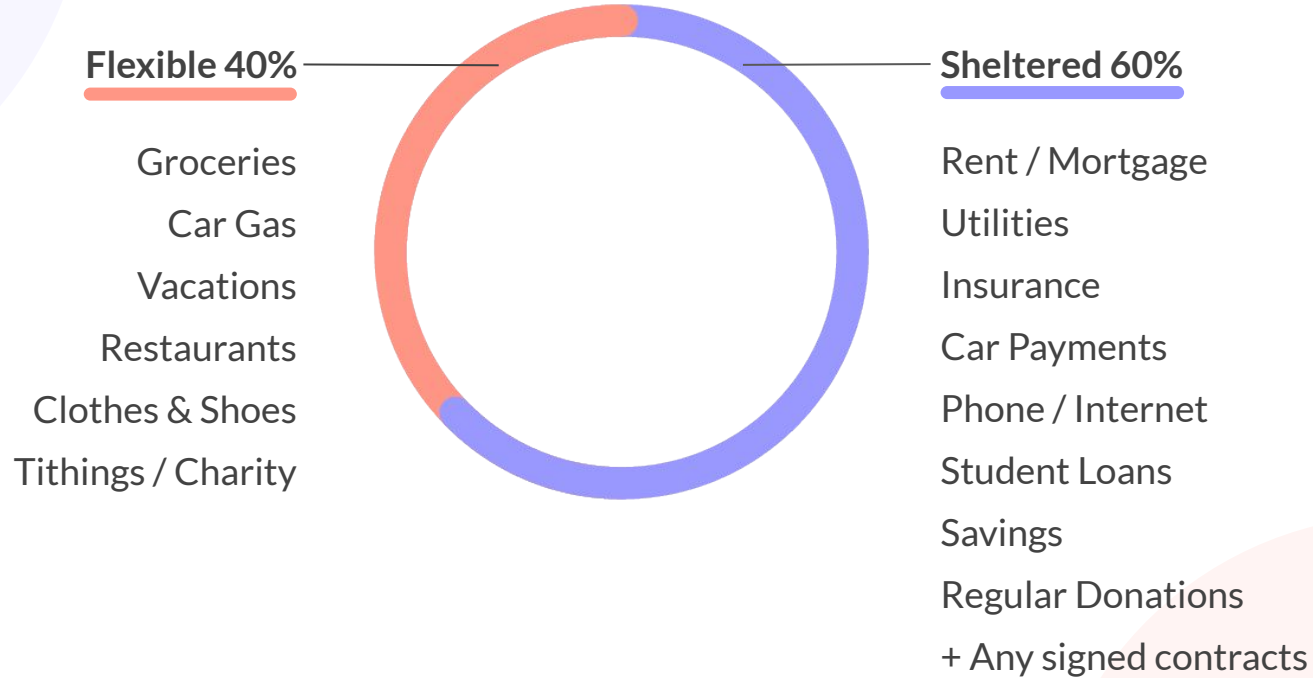
Yes

No

I have followed a plan in the past
but do not currently use one.



Let's Talk About Plans



Visual Financial Planning

Use your pencil and paper to draw everything you spend money on in a given month.



Recommendations

Financial stress is real, it causes real physical and mental health problems, be kind to yourself.

- Set a regular time each week to check in on your Plan
- If there are actions to take, consider doing one per day
- Pay yourself (future), make it automatic
- Set up automatic payments, day/two after your paychecks clear
- Revisit your Plan when your situation changes

What do you spend money on each month?



What did you forget?



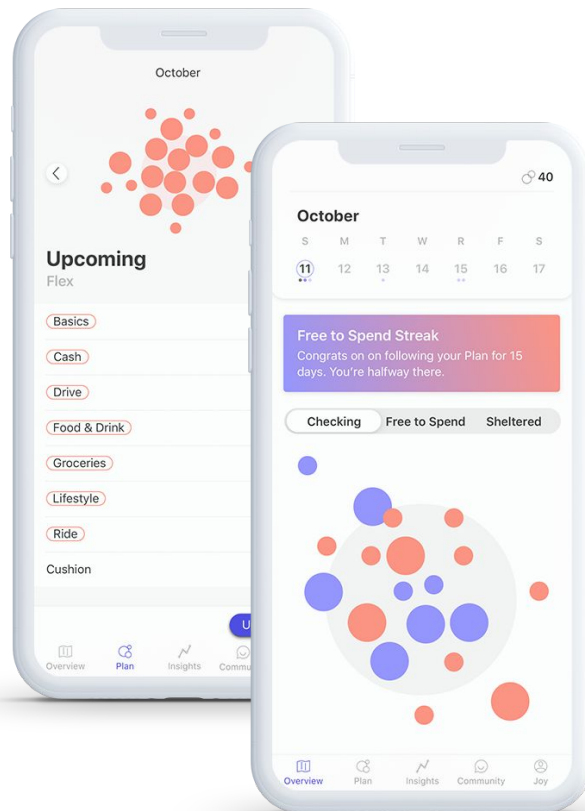


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Get \$10 when you create your first Plan + \$5 for every CHW you refer!



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Q & A



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