

Ahoy, Money! Webinar

Webinar Session 8

Chapter 7-

Continuing Your Voyage

Presented by Author

Paul Lemon, CPA/PFS, CFP®



Worksheet page 69

1

Welcome to this last Ahoy Money Bonus Webinar session.

In our time together, we'll take a look at Worksheet 7 – The Changing Shape of Your Identity.

I recommend you read Chapter 7 – “Continuing Your Voyage” if you have not done so already, before watching this webinar.

Webinar Session 8

Chapter 7

Worksheet 7 – “The Changing Shape of Your Identity”

- What changes do you notice in how you see your life since you began?
- “Genuine Financial Freedom” – using money as a means of living authentically.
 - The more money we have, the harder it is to maintain this freedom.
- Transformation vs. Escape
- Journey vs. Destination



Worksheet pages 69-72

2

Worksheet page 69 includes some highlighted comments about our identity.

When you began, you may have thought that this book would give you all the answers about how to be rich and live a life of leisure.

Early on, however, you must have reconnected to another identity that wanted more out of life than sitting at the pool counting your money!

This slide summarizes the journey you’ve taken in these pages. Completing the worksheets, pondering the chapters, listening to my commentary and guidance – all deepening your awareness of who you really are.

You now see that your life is far too deep to ever define a destination and quantify it with just money goals.

Identity – Old and New

- Worksheet pages 69-72 ask you to reflect on the 8 aspects of your life as reflected in your finances revealing the 2 dimensions of our human journey.
 - Our horizontal breadth – connecting with individuals and society.
 - Our vertical depth – connecting with our bodies and our Spirit essence.



Worksheet page

3

Find the Money Balance and Contentment Chart – it is page 24 of your Worksheet Packet – and you may have moved it to the front of your Worksheet Notebook.

As you go down the list of the column “aspect of money”, on page 70, write in your first reaction or how you used to allow this aspect of money identify you - in the “my old identity column”.

After finishing all 8 aspects of money – go back and write down how this part of your financial life reveals your identity now.

You may find it helpful to glance back at the short descriptions in the Money Balance and Contentment Chart or refer back to Chapter 2 of the book.

Identity Shift

The last question on Worksheet 7 – page # 72 asks you to identify which aspect of your current identity is being challenged most through your money.

- Seeing every detail of your life as just as it should be – documents?
- Honoring your interdependency with others? – Cash Flow?



Worksheet page

4

This slide, with the next one, allow you to identify the area of your identity that is shifting in you now.

Don't worry if none really stick out – as you continue giving these 8 aspects of your finances your attention – rather than your energy – a particular area will surface

.

Identity Shift - continued

- Respecting Yourself as Equal with Others – Debt?
- Carrying Your Share of Society's Needs with a Willing Heart? – Taxes?
- Accepting The Reality of Your Death- Estate Planning.
- Exercising your "Watcher" – Life Clarity.
- Respecting Life's Seasons vs. Hoarding- Investing.
- Embracing life's Uncertainty and Frailty – Insurance.



Worksheet page

5

This last question, again, asks “which identity shift is calling for your greatest energy?”

Energy is meant to be reserved for your transformation from identification with your ego .

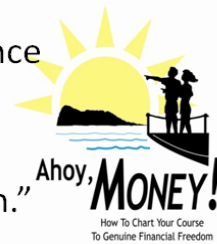
Energy is available for these shifts when not dissipated through attachment to all the circumstances and money decisions of our lives.

Energy is what you now have to truly live into the changing shape and fading significance of who you see yourself to be.

And money is the tool you’re learning to use to continue this journey!

Congratulations!

- You've reclaimed your power as Captain of your Life.
- You've courageously set sail on this Vast Sea of Money.
- You've navigated through deadly hazards by refusing to deny financial realities.
- You've harnessed the power of your ship – the financial budget – to experience transformation.
- You now see your money as an ally in living the "one life you can call your own."



Worksheet page 72

6

Congratulations, indeed! (Read the list)

Just keep in mind, this way with money will take continued practice.

Apply the steps you've learned in this book and consider continuing your journey with the TEN WEEKS course that actually takes you into the details of these 8 areas of financial attentiveness.

Around the World of Your True Self

- You now have tasted genuine financial freedom.
- Continue to cultivate these skills so your relationship with money reflects your true nature;
 - Loving
 - Generous
 - Integrated body, mind, soul, spirit
 - Adaptable and flexible
 - Patient
 - Kind
 - Intuitive and Wise



Worksheet page 72

7

As you face different seas of transformation, that grant you the honor of accessing deeper levels of your true nature –

Cultivate your newfound relationship with money to assist you in making those crossings.

You are truly all of these qualities. Let them surface and bless the world with the gift of “the one life you can call your own”.

How will money serve you
as you continue on across
the Sea of Your Life?



Worksheet page 72

8

Each of you have a beautiful and unique answer to this question.

My heartfelt prayer for each of you is that nothing impedes this amazing journey of authenticity that you have undertaken.

It truly has been an honor to sail with you thus far.

Bon Voyage!!