

WEEK 1 / YOUR MONEY HAS A PURPOSE

Start with the people it serves

Today you will connect one person or purpose, one priority, one fact or unknown, and one manageable next step.

The Retirement X-Ray supplies the Q4 planning structure. The Steward's Code adds a Christian stewardship lens: resources are entrusted to our care. Money, time, skills and attention can all serve a purpose. Wealth is not a measure of a person's worth or faith.

Meet Jordan and Casey. This hypothetical household wants a clearer picture before another money decision. They care for their household, occasionally support an older relative, and value their church community.

Q1 Who matters most?

Their household, older relative, church community and themselves. Caring can include time and attention; a relationship is not a promise to spend.

Q2 What matters most?

A need: understand essential bills. A want: time together. A wish: support a literacy ministry when they understand their capacity.

Q3 What do you have to work with?

Income and savings need a current check. Some bill dates are missing. A hoped-for pay rise stays unconfirmed. Time and willingness to learn are resources too.

Q4 How do we play to win?

This week: agree a short time to list income and bill dates, then choose one question to investigate. Their first win is clarity, not a product or guaranteed return.

Book sources: X-Ray pp. 91-100, 103-104, 110-114; Steward pp. 48-49. Printed pages; manuscript editions. Original teaching adaptation.

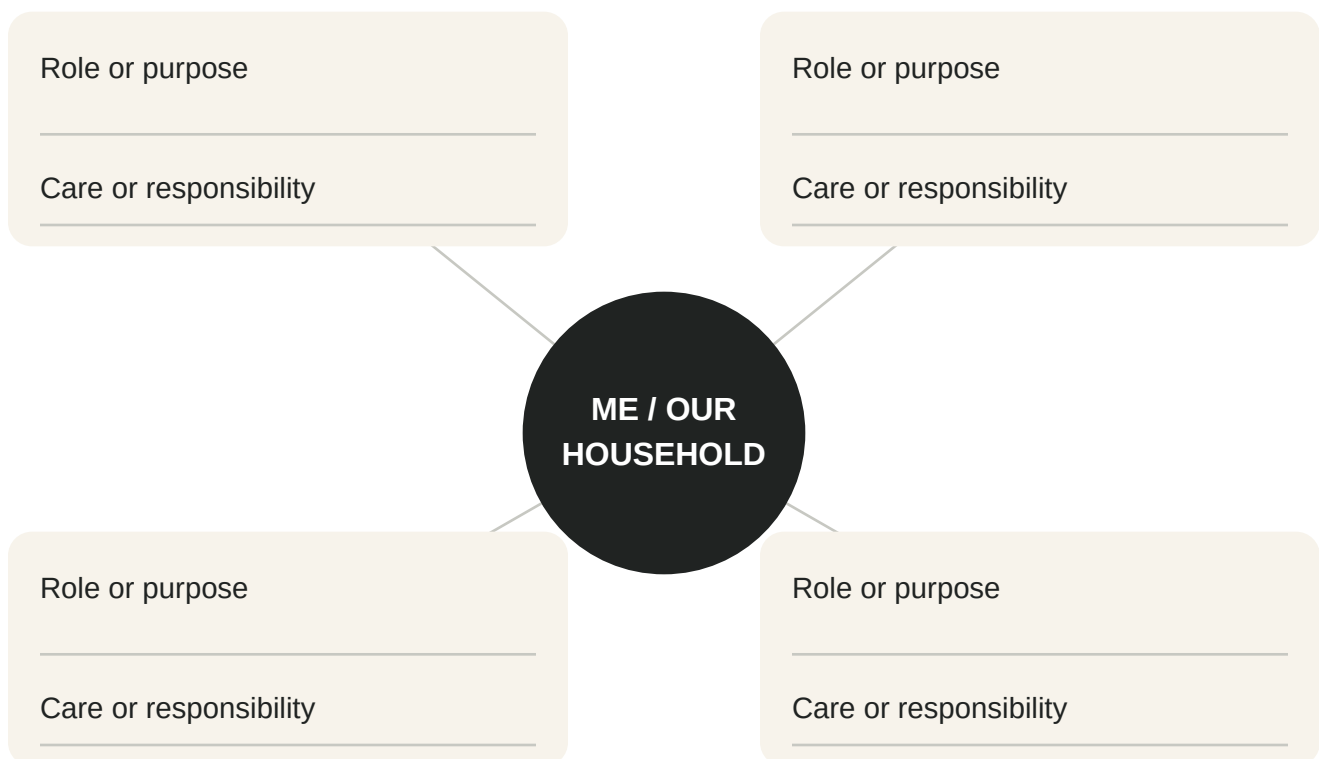
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Make your Relationship Web

Use Jordan and Casey, or your own situation. Roles or initials are enough. Sharing with the group is optional.

My starting question What would I like to understand more clearly?

Q1 Who matters most? Add people, responsibilities or causes around the center. Include yourself. Beside one connection, note what care or responsibility means.



Original workshop adaptation of the Relationship Web exercise in The Retirement X-Ray, printed page 94. This is not a copy of the book's artwork.

Heart reflection What has been entrusted to my care, and what could responsible care look like this week? You may write, think quietly or pass.

No balances, account numbers, health details or other people's private information are needed. Keep this sheet; do not upload it to the website.

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Turn purpose into a first step

This page starts your own learning plan. It is not a complete financial plan or a professional recommendation.

Q2 What matters most? Choose one need, want or wish connected to your web. Why does it matter?

Q3 What do you have to work with? Name one resource or obligation and one unknown. Amounts are optional. Mark an assumption as unconfirmed.

Resource or obligation:

Unknown and how I could verify it:

Q4 How do we play to win? Choose one step that makes the picture clearer. What needs checking or another person's agreement first?

When I will revisit this page: _____

Check your understanding

1. A hoped-for pay rise is: confirmed income / unconfirmed information.
2. A Relationship Web includes: only recipients of money / people, care and causes.
3. A first-week win is: a guaranteed outcome / a clearer fact and next step.

Answers: Unconfirmed information; people, care and causes; a clearer fact and next step. Explain why using the fictional example. Retries are welcome.

Take home: Keep your map. If safe and useful, ask someone in your household what they want your resources to make possible. Next week: needs, wants and wishes. A private review with a qualified financial advisor is optional; scope, costs and secure sharing are agreed separately.