



Braiding the third strand: Supporting health and well-being

Activity 9: Sharing my dreams with family and friends

This activity will guide you as you prepare to share with family and friends your financial goals and that steps you plan to take to achieve them.

Sharing your dreams strengthens your plan by inviting trusted loved ones to support and inspire you. When we share our goals and learn together, we build stronger, more resilient communities that can thrive for generations.

Step 1: Identify your goals

Think about your financial goals (*Refer to Activity 7: Picture your money goals*). Write down your main financial goals.

Now think about three specific things you hope to achieve soon that will help you move towards these larger goals. (These could be initial steps or milestones.)

1.

2.

3.

Step 2: Prepare to share

- Think about who you want to talk to (family, friends, or community members).
- Choose a good time and place to have the conversation where you can talk openly.

Step 3: Talk clearly and listen well

- Clearly explain your main financial goals (from Step 1).
- Share some of the activities you have completed in this bundle. You might want to refer to ideas you had in *Activity 2: My goals*, or *Activity 8: My future investment plan*.
- Listen to what others have to say and be open to their ideas. Keep notes of what they share.
- Ask questions if you don't understand something or if you want to learn more about others' experiences or suggestions.
- Who else could you invite into this journey? Think about other friends, Elders, or community members who can walk alongside you and support your financial wellness goals.

Activity 9: Sharing my dreams with family and friends (Cont'd)

Step 4: Work together

- Reflect on and talk about the different options and suggestions that were offered to reach your money goals.
- Ask yourself: How might your choices ripple out to others you care about?
- If you are sharing with multiple people, discuss and try to make a plan that feels fair and works for everyone involved.

Step 5: Take action

- Set small steps to follow your plan.
- Check in with your family or friends regularly to see how it's going.

Reflection and notes

How did it feel to share your dreams, goals and plans for your settlement with others?

What advice did you find most helpful?

“Like sharing stories around the fire, talking about our goals, dreams and plans for our money helps us learn, grow, and make better choices together.”

