



THE CENTER FOR  
**Clarity, Compassion & Contentment**

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*find your center*



# Wellbeing @ Work 2023

## Financial Wellbeing

**Kim Perone, MA, CLC Wellbeing Coach, Consultant, and Mindfulness Facilitator**

*When clarity, compassion, and contentment are present an inspired life is possible.*

# Wellbeing is...

defined as

...the experience of health, [happiness](#), and prosperity. It includes having good mental health, high life satisfaction, a sense of meaning or purpose, and the [ability to manage stress](#).

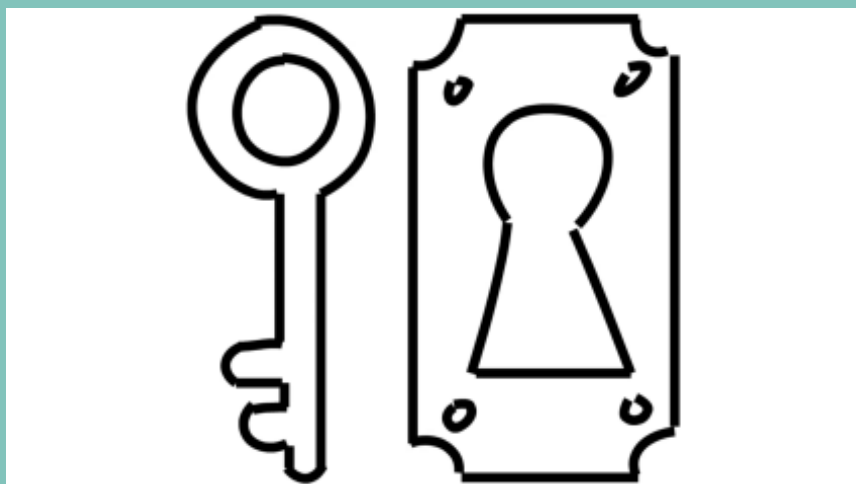
~ Dr. Tchiki Davis  
Psychology Today contributor  
Berkeley Wellbeing Institute



# Wellbeing@Work

## WELLBEING ELEMENTS

- Emotional
- Physical
- Social
- Workplace
- Community
- Financial



## NOTES

Address Burnout

Growth Mindset

Patience & Trust

Positive Attitude



*Wellbeing is something sought by just about everyone because it includes so many positive things — feeling happy, healthy, socially connected, and purposeful.*

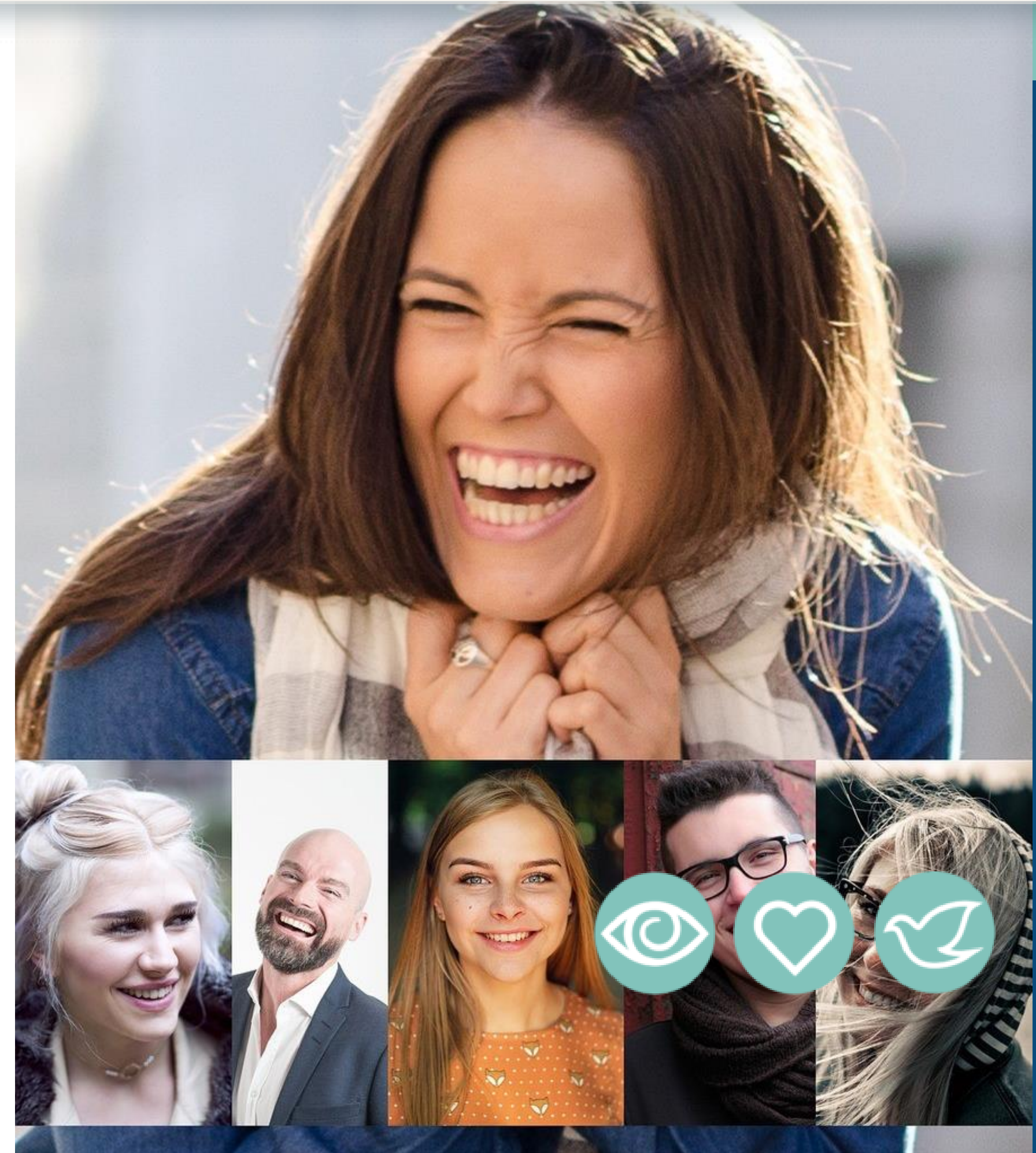


*Unfortunately, wellbeing appears to be in decline, and increasing your wellbeing can be difficult without knowing what to do and how to do it.*

# Financial Wellbeing

**72%** American Psychological Association (APA) study found that an average of  
of Americans feel stressed about money

- ✓ People with high financial wellbeing manage their personal financials and money wisely.
- ✓ They buy experiences rather than just material possessions.
- ✓ They give to others and not just buy for themselves.
- ✓ Satisfied with their standard of living.
- ✓ They engage strategies which result in financial security, eliminating daily stress and worry caused by debt.
- ✓ They have financial freedom to spend time with people they like to be around.



# Financial Wellbeing

You manage your money well.

✓ What are my financial goals?

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✓ What additional tools/skills/resources do I need to achieve my financial goals?

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✓ How might a new approach to my finances help me improve my wellbeing?

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# Financial Wellbeing

✓ What can I do today that will have a positive influence on my long-term financial goals?

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✓ How do I convey a sense of fairness and equity when discussing compensation with employees?

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✓ How can I promote opportunities to improve my team's financial wellbeing?

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# Financial Wellbeing

Take action with these best practices.

- ✓ Brainstorm new habits that are cost-effective and promote saving money.
- ✓ Encourage each other to bring lunch from home rather than eating out.
- ✓ Buy experiences rather than material purchases.
- ✓ Establish automated payment and savings.





# CENTER4C FINANCIAL WELLBEING

## SELF

✓ What are my financial goals?

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✓ What additional tools/skills/resources do I need to achieve my financial goals?

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✓ How might a new approach to my finances help me improve my wellbeing?

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✓ What can I do today that will have a positive influence on my long-term financial goals?

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## TEAM for managers

✓ How do I convey a sense of fairness and equity when discussing compensation with employees? \_\_\_\_\_

✓ How can I promote opportunities to improve my team's financial wellbeing? \_\_\_\_\_

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## BEST PRACTICES for managers

✓ Brainstorm new habits that are cost-effective and promote saving money.

✓ Encourage each other to bring lunch from home rather than eating out.

✓ Buy experiences rather than material purchases.

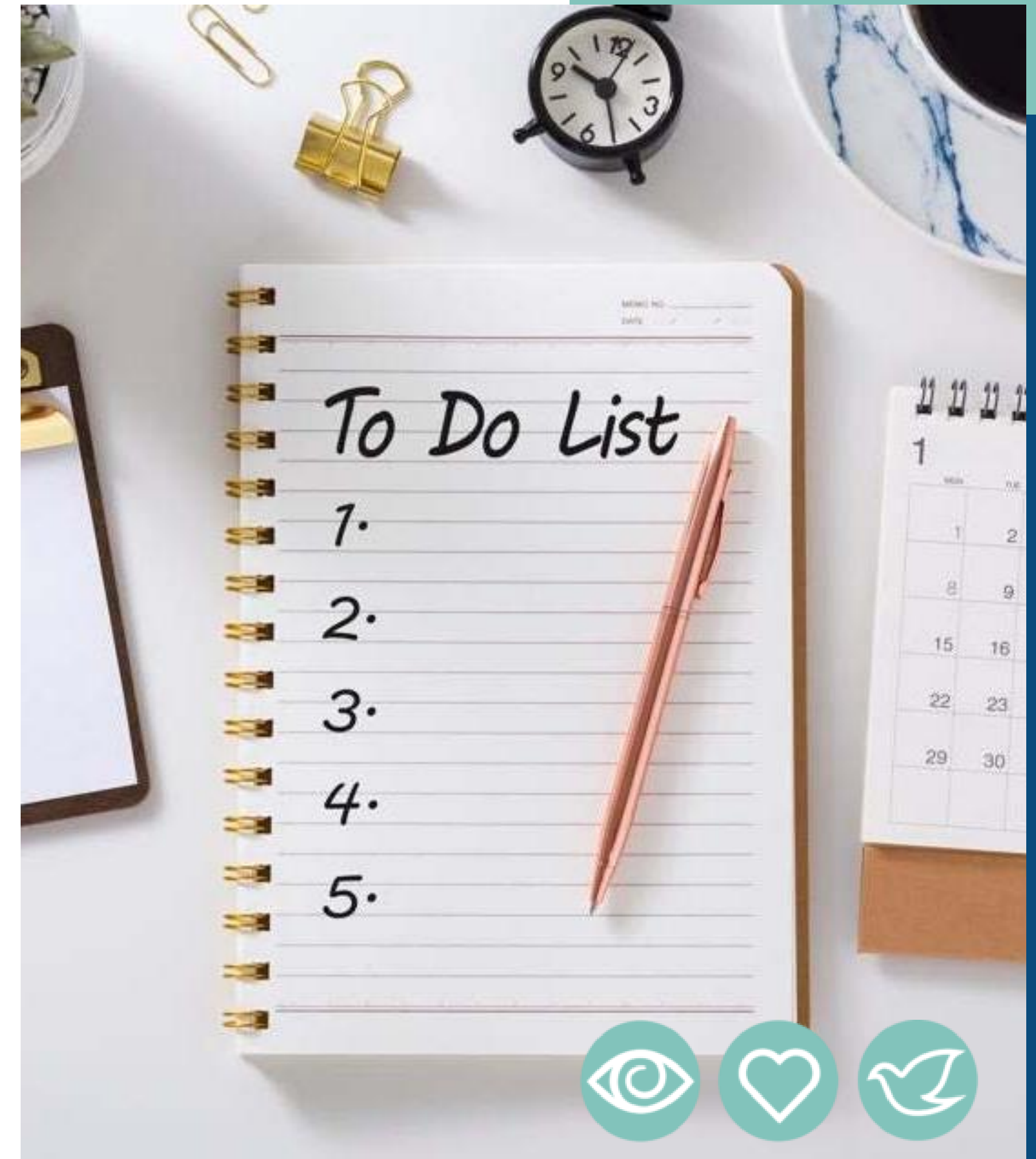
✓ Establish automated payment and savings.

*Kim Perone, MA, CLC, Wellbeing Coach & Consultant*  
*[kperone@center4c.com](mailto:kperone@center4c.com) (518) 301-3593 [www.Center4c.com](http://www.Center4c.com)*

***Find your center.***

- ✓ Finance can be an enormous stressor.
- ✓ Small steps make a big difference.
- ✓ More is not necessarily better.
- ✓ Supporting self or staff with resources to improve goes a long way!

**Your wellbeing matters!**





# CONTACT

Kim Perone, MA, CLC, CWMF  
Wellbeing Coach, Consultant  
& Mindfulness Facilitator

kperone@center4c.com  
(518) 301-3593 [center4c.com](http://center4c.com)  
[Calendly.com/kimperone](https://calendly.com/kimperone)



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*Do something today that your future self will thank you for. ~Anonymous*

***Taking care of your wellbeing is  
quite possibly the best gift you  
can give yourself, others, and the world.***



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