

My Haven: What Do I Reveal?

How long have I known this individual? _____

Is he/she in my inner circle of my 2 or 3 best friends? _____

On a scale of 1-10 (1 = “not at all” and 10 = “absolutely”), how much do I trust him/her?

What values do we have in common?

What priorities do we have in common?

How will I benefit from beginning to tell my friend about my financial situation and experiences?

How will my friend benefit from hearing about my financial situation and experiences?

Can this subject wait? _____ Why or why not?

How do we handle power struggles in our relationship?

Advice: If you have known this friend for at least a year, and if your answers above were positive, you may consider beginning to give him/her specifics beyond “I come from a wealthy family.” And reveal your precious and private information in baby steps. Observe how each step goes. If you don’t like a step, stop.

Suggestion: If you are ready to bring this friend into your private financial life, you can start by bringing up a question from the *Intergenerational Questionnaire* for discussion by both of you. Then another and another.