

We all know that money and planning can bring out the best and the worst in people. At a minimum, it will highlight the differences between people doing these things together. We use The Birkman Method® to gain insight into personalities and perspectives that help manage the types of conflict we know bring the greatest risk to a family's wealth.

The Birkman Method® categorizes people into four colour quadrants. Consider which one you, and those close to you, might be, and how that might affect your approach to wealth and planning.



## WHAT IS YOUR WEALTH COLOUR?

### Red | “Doers”

**Reds** like making quick decisions and getting results. Direct, action-oriented, and focused on the task at hand. **Reds** enjoy working with their hands, solving practical problems, and producing tangible things. Objective, energetic, commanding, and enjoying team competition, **Reds** get results through action.

**Reds** enjoy doing things that create wealth but may not spend a lot of time in discussion and analysis. Their initiative is certainly a strength, but they may miss the opportunity to gather input from others. They can become frustrated with a perceived lack of progress and may push for results or do something else while waiting for others to “finish their thinking”. **Reds**, more comfortable with risk, can help others move past thinking into action but can benefit from taking a long-term perspective, engaging patiently in discussions and planning, and communicating effectively to all stakeholders.

### Green | “Communicators”

**Greens** have a strong desire to communicate and work with people. They are often promoting, motivating, counselling, teaching, or working with people to get results. **Greens** communicate with ease and confidence about things they believe in. If you want someone to win friends and influence people, a **Green** is the person for the job.

**Greens** are drawn to opportunity and ideas, responsive to change, and like to win. They like networking and communicating broadly. Less concerned with details, **Greens** can be spontaneous, early-adopters, capturing opportunity others may not. However, they can start new things before others are ready or the necessary planning and resources are in place. **Greens** can be effective at getting people on-board with new ideas, but can also spend more time selling their ideas than executing. **Greens** are great for helping others step out of their comfort zones, but will benefit from listening, reflecting, and focusing on details when necessary.

### Yellow | “Analyzers”

**Yellows** love working with processes, details, definitions, and rules. They enjoy doing calculations, scheduling, recordkeeping, and establishing systematic procedures.

**Yellows** are usually comfortable with numbers, prioritize fairness, and are cautious and thorough. Task-oriented people, they may prefer indirect communication methods like documentation, policies and procedures. If you need to get organized, find a **Yellow**.

**Yellows** ensure things are done right. They are likely the ones working late, making sure the numbers and information are accurate and understood. More introverted, they prefer not to be directly involved in debating issues or promoting ideas. They believe information should speak for itself. **Yellows** may seem to prioritize data and process over people, but they are also very conscientious and work hard to ensure clarity and fairness for all. **Yellows** can benefit from ramping up their inner salesman from time to time and making meaningful connections with people, remembering that quality of information and process is not always the answer.

### Blue | “Thinkers”

**Blues** are concept and idea people, loving innovation and long-term planning. They thrive on generating fresh ideas and viable solutions for problems. They tend to be introspective, good listeners, who focus on intangibles and deeper relationships with individuals.

**Blues** are great planners and designers. They love to explore deeper questions and imagine possible futures. They do not impose themselves on others and are considerate of the experience they are having. However, **Blues** are less comfortable with risk, and this imaginative, careful style can turn to worry and withdrawal, leading them to struggle with decisions and actions. **Blues** can help others have more meaningful experiences and consider the bigger picture and factors aside from money or progress. At times, they can benefit by being more objective, committing to plans quicker, and getting by with less information and thinking.