Personalization is Everything

Speakers: Elizabeth Husserl, Author of "The Power of Enough: Finding Joy in Your Relationship with Money"

Session Summary

Elizabeth Husserl reframed wealth as well-being—a balance of purpose, connection, and financial security. Drawing from her book The Power of Enough, she encouraged advisors to help clients define what “enough” truly means and to build plans that reflect personal fulfillment, not just accumulation. Through tools like her Wealth Mandala, she demonstrated how personalized conversations about values, health, and satisfaction can create deeper trust and lasting impact.

Key Takeaways

- Wealth = Well-being: True wealth blends purpose, relationships, and financial peace.
- Redefine “enough”: Ask clients to define what enough means in their own words.
- Advisor advantage: Empathy and curiosity outperform algorithms.
- Use the Wealth Mandala: Map satisfaction across health, purpose, leisure, and connection.
- Human behavior lens: Financial patterns mirror emotional stories; unpack them.
- Shift from more → meaning: Encourage clients to pursue what feels full, not just what looks full.
- Integrate reflection: Add values check-ins to client reviews—make it a living conversation.
- Measure impact differently: Include joy, health, and time freedom in your metrics.
- Advisor’s new KPI: “Client feels at peace” is just as important as “portfolio grew 8%.”

Quotes to Remember

- “Enough isn’t a number—it’s a feeling.”
- “Money is a tool, not a trophy.”
- “Wealth has roots in well-being, not net worth.”

Action Items

1. Incorporate a “Define Enough” question into every annual review or discovery call.
2. Introduce the Wealth Mandala tool or a similar life-satisfaction visual in client meetings.
3. Add one personal goal or wellness metric to each client’s financial plan.
4. Schedule reflection checkpoints (quarterly or annually) to revisit how clients feel about their progress.
5. Share Husserl’s “Power of Enough” concept in your next newsletter or client workshop.