

# Wealth in Focus



## Letter from the Editor

This month, we're focused on "Financial Fitness" — a concept that goes beyond traditional wealth management.

You'll find articles challenge conventional wisdom, from rethinking budgeting to understanding the global economy. We explore joint bank accounts, and offer insights into the mental aspects of money management.

The centerpiece of this month's focus is our newly launched Financial Literacy Assessment. It's a powerful tool to evaluate your financial knowledge and habits. Are you ready to take charge of your financial future? [Take the assessment](#) (or share it with a client!) and see how you stack up.

Finally, don't miss our podcast with Christine Mendonca, where we explore the motivations and methods behind philanthropy. Her insights are not just thought-provoking but actionable for making a positive impact.

P.S. There's a special announcement at the bottom of this newsletter that you won't want to miss!



KIRBY ROSPLOCK, PHD  
FOUNDER & CEO  
Tamarind Learning

## Featured Resource

### Podcast: Financial Influence and Impact Investing with the Next Generation

In this episode of the Tamarind Learning Podcast we explore the powerful intersection of financial fitness and impact investing. Our guest, Christine LeViseur Mendonca, a seasoned advocate and advisor, shares her remarkable journey into impact investing and its evolution over the years. Discover how younger generations are reimagining their influence and wealth management, all while fostering financial fitness. Gain valuable insights into the urgent and transformative realm of impact investing, where financial well-being and positive societal change converge.



[Listen Now!](#)

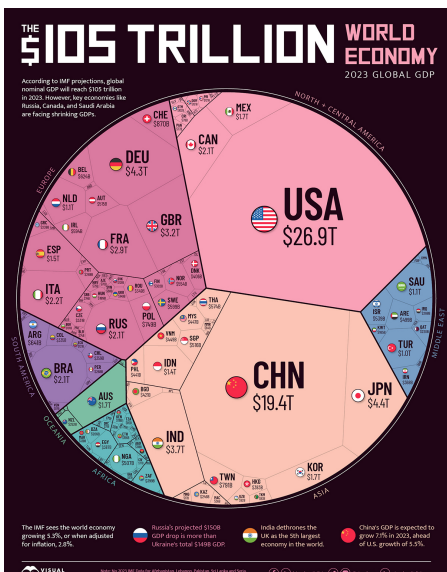
## Developing Financial Fitness



### Hate Budgeting? Try Rethinking It.

Budgeting doesn't have to be a dreaded task; it can be a powerful tool for achieving your financial goals. This article from Morningstar offers a fresh perspective on budgeting, providing valuable insights on how to reframe your approach. Discover practical tips to make budgeting work for you and align with your financial aspirations. Dive into the world of effective budgeting with this must-read piece.

[Read More >>](#)



### The \$105 Trillion Global Economy

Explore the fascinating insights provided in this article from Visual Capitalist. It delves into the intricacies of the global economy, highlighting key factors and trends that contribute to its immense size and complexity. Gain a deeper understanding of the forces shaping our economic landscape.

[Read More >>](#)

**Think you're ready to manage your wealth?**

Test Your Financial Knowledge

Start Your Assessment



### The Benefits and Considerations of a Joint Bank Account

In this insightful article from The Wall Street Journal, discover the advantages and important considerations when it comes to having a joint bank account. Gain valuable insights into managing finances together, the potential benefits, and the potential pitfalls to be aware of. Whether you're considering a joint account or want to make the most of an existing one, this article offers valuable guidance.

[Read More >>](#)



### Five Rules for Financial Fitness

Explore timeless financial wisdom in this Forbes article. It offers valuable insights into saving, retirement planning, investment portfolios, and funding college education. Whether you're just starting your financial journey or well into it, this article provides practical advice to help you navigate various life stages.

[Read More >>](#)

## Special Announcement [???

WEALTH EDUCATION SELF-ASSESSMENT



Now through the end of December, when you [schedule an education assessment](#) and purchase a course - **you'll get a second course FREE.**

We have officially unbundled our coursework - meaning you can now **create your own custom learning path** from any of our ten courses.

Unsure where to begin? Our Wealth Knowledge Assessment will help you discover areas for growth.

[Start Your Assessment](#)

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**Editorial Mission:** To provide monthly news, education, and professional guidance that help families, advisors, and trustees become extraordinary stewards of wealth.



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