



# JAMIE Traeger-Muney

Wealth Psychologist, Speaker,  
Founder of Wealth Legacy Group

## Thrive & Help Thrive:

Leveraging Your True Net Worth to Create Positive Impact in the World

DR. JAMIE TRAEGER-MUNEY supports individuals, couples and families of wealth in **discovering their True Net Worth**.

She works with clients to assess their Values, design their Vision and leverage their resources towards creating positive Impact in the world, allowing each person she works with to **lead a truly Rich Life**.

Jamie is a **powerful thought-leader whose presentations are insightful and inspiring**.

She engages participants with relevant stories from her own life and from her extensive work with clients.

**Her style is permission granting, warm and authentic, normalizing feelings** that many wealth holders have experienced, but never had the opportunity to discuss.

## CONTACT



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## TESTIMONIALS

“As someone involved in my family’s business for most of my life, I understand the emotional component that money can play in relationships but had never heard it articulated quite the way Jamie was able to through her engaging storytelling. She has managed to take the complicated and uncomfortable topic of wealth out of the closet as she passionately delivers her message with enthusiasm and empathy.”

-Linda Stuart, Vancouver, Canada

“Jamie was really authentic and knowledgeable as a speaker. Her story about her client making peace with her wealth was so inspiring. She helps her clients feel authentically aligned with their wealth in a true and heartfelt way. You could feel her warmth for her clients through the delivery of her speech.”

-Lisa Fraley, Maine, USA

“OMG Jamie! I loved her sincerity and extremely honest delivery. She has made me realize that being out of alignment does not only happen to those who don’t have, but to those who have it all. What a gift Jamie has to give the world.”

-Brenda Ann Tsiaonsis, Hobart, Tasmania

## ABOUT JAMIE

**DR. JAMIE TRAEGER-MUNEY specializes in the emotional impact of money and wealth in people's lives.** She has revolutionized the conversation of wealth and worth by providing an opportunity to **openly discuss the roles money plays in her client's lives**, enabling them to be passionately engaged in the world and to lead a rich life.

Jamie's personal experience as an owner of a family business and board member of her family foundation, combined with her expertise in wealth psychology, has given her **a unique sensitivity to issues surrounding the inter-generational family dynamics of affluence.**

**Jamie has the distinction of being the first psychologist ever to be hired as an employee of a bank**, to work with their clients. She worked as a Family Wealth Consultant for Wells Fargo's Family Wealth Group, a multi-family office platform serving families with \$50 million and above in investable assets.

AS SEEN IN

THE WALL STREET JOURNAL  
**WSJ**

HUFF  
POST

**Bloomberg  
Businessweek**

FT  
FINANCIAL  
TIMES

BBC  
NEWS

the  
**guardian**

## KEYNOTE SPEECHES & PRESENTATIONS

### *Thrive & Help Thrive Using your True Net Worth to Create of Positive Impact in the World*

We are currently experiencing particularly turbulent times. The prevailing mindset is win/lose and as a result, a lack of cooperation and scarcity prevail. Research shows that the more we focus on helping others to thrive, the more we thrive ourselves. By helping others, we each play an integral part of making positive changes in the world, and by doing so, we also experience greater meaning and fulfillment in our own lives. During this presentation, participants learn:

- How to experience greater levels of thriving while simultaneously positively impacting the world;
- How to leverage your impact;
- How to use Thrive & Help Thrive to raise empowered children.

### *How to Raise Empowered Rather than Entitled Children*

Raising children well is the number one concern we hear from parents and grandparents. This interactive presentation provides participants with the opportunity to openly discuss challenges related to money and wealth. During the presentation, participants learn:

- The 4 aspects of an empowered child;
- How to share your financial wealth with your children, without robbing them of their motivation;
- Effective tools to communicate with children, at developmentally appropriate levels, about money, privilege, and giving.

### *Navigating Family Wealth Dynamics: What to Do When Challenges Arise*

Using a fascinating case study of famous sisters, this presentation explores family dynamics associated with money and wealth and how to cool down heated tempers when problems occur. Participants will learn:

- How to identify positive and negative family patterns;
- Tools to facilitate effective conversations within families;
- How to develop an aligned family action plan to support family development.

