



The M Word Journal: How to Have the Money Talk

By Lori R Sackler

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Is money pulling your family apart?

The M Word Journal is based on Sackler's groundbreaking 2013 book, *The M Word* (McGraw-Hill Education, 2013, updated 2016), which continues to change the way families view and spend money, transfer assets and wealth, and pass along values. *The M Word Journal* is a new and comprehensive guide on how to successfully orchestrate the crucial conversations around life's most profound transitions. It will, along with *The M Word*, help you negotiate every aspect of your family finances so that you can ultimately keep your money and family relationships intact.

The M Word provides guidance on how to approach the most delicate of subjects without anxiety or stress, so families can reap the benefits of secure financial planning for generations to come. *The Journal* goes even further and offers a detailed roadmap around Sackler's five-step plan, so you'll be able to:

- Successfully prepare for, initiate, and execute the "Money Talk"
- Gather and understand the essential information
- Tackle the issues that accompany wealth transfers and life's transitions
- Overcome the roadblocks that can keep families from communicating
- Prepare yourself and your family--logistically and psychologically--for the Money Talk
- Create a process for making regular talks that can keep your family and finances intact

The M Word Journal takes you through the "how to" of the Money Talk.

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Editorial Review

Review

"The M Word Journal provides THE detailed roadmap for all investors and their family members to successfully navigate life's defining transitions." -David M. Darst, CFA, Founder of, Senior Advisor to, and Member of Morgan Stanley's Global Investment Committee "A most mindful guide to having conversations about money." -Eileen Gallo, PhD, coauthor with Jon Gallo of Silver Spoon Kids ..".a practical handbook for anyone looking to have these critical Money Talks with their parents and children across a wide range of life events." -Shelley O'Connor, Co-Head of Wealth Management, Morgan Stanley "Successful wealth management often starts with open and honest conversations about money and its role in a family's life goals. Lori Sackler's The M Word Journal is a practical handbook for anyone looking to have these critical Money Talks with their parents and children across a wide range of life events. With easy-to-follow worksheets and instructions, the book guides you through these important and sometimes difficult conversations to help secure your family's financial future." -Shelley O'Connor, Co-Head of Wealth Management, Morgan Stanley "With her insightful book The M Word, Lori Sackler showed us how to tackle the difficult financial decisions that families face such as when to retire and how to care for elderly parents. Now with The M Word Journal, she spells out the concrete steps families must follow to tackle these decisions successfully." - Richard Marston, Professor of Finance and Director of the Private Wealth Management Program at the Wharton School "The M Word Journal is an accessible easy-to-use workbook that will help address one of the most difficult of life's issues-money. The book takes readers with simple questions and templates through the most volatile of money situations: changes, remarriage, retirement, elderly parents, and inheritance. If using this workbook serves as the catalyst for even an hour-long conversation on any of these topics, both you and your loved ones will benefit handsomely." -Martin M. Shenkman, CPA, MBA, AEP, PFS, JD, estate attorney and author "Lori Sackler continues to dazzle and sparkle with her wise investment judgment and her experience-based insights into the complexities of family dynamics and the money conversations ensuing therefrom. The M Word Journal provides THE detailed roadmap for all investors and their family members to successfully navigate life's defining transitions." -David M. Darst, CFA, Founder of, Senior Advisor to, and member of Morgan Stanley's Global Investment Committee "How to Have the Money Talk! With insight and knowledge, Lori Sackler in the M Word Journal takes the reader through the steps that will lead you through the productive conversations necessary for successful financial decisions. In concert with the M Word, she will help reduce the financial anxiety and stress in your life and enhance your overall sense of well-being." -Hendrie Weisinger, Ph.D., New York Times bestseller, Performing Under Pressure: The Science of Doing Your Best When it Matters Most "This journal is very well organized with an array of practical charts for each life transition category. I especially appreciate Lori's thoughtful, positive approach in asking the many open-ended questions. A most mindful guide to having conversations about money." - Eileen Gallo, PhD, coauthor with Jon Gallo of Silver Spoon Kids"

About the Author

LORI R. SACKLER is a financial advisor, Senior Vice President and Senior Investment Management Consultant at Morgan Stanley Wealth Management, where she leads the Sackler Group. Sackler, with her team, advises a select group of individuals and families on financial security, lifestyle and legacy concerns. Sackler is a Certified Financial Planner, Certified Investment Management Analyst, and non-practicing Certified Public Accountant. She is also the creator and former host of the radio show The M Word on WOR in New York City and author of The M Word: The Money Talk Every Family Needs to Have About Wealth and Their Financial Future (McGraw-Hill Education, second edition, 2016) and The M Word Journal (2016).

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