

Team Exercise

Key Definitions:

ABCs of Meaning

- **Agency:** Autonomy, freedom, creativity, mastery; the belief that you can impact the world around you.
- **Belonging:** Relationships, community, friends, family; the people that surround and nurture you.
- **Cause:** A calling, a mission, a direction, a purpose; a transcendent commitment beyond yourself that makes your life worthwhile.

Me / We / Thee Stories

- **Our 'Me' Story:** The one where we're the hero, the doer, the creator; we exercise agency and, in return, feel fulfilled.
- **Our 'We' Story:** The one in which we're part of a community, a family, a team; we belong to a group and, in turn, feel needed.
- **Our 'Thee' Story:** The one in which we're serving others; we give of ourselves to others and by extension, feel part of something larger.

Workshop Agenda (60–90 minutes)

1. **Individual Reflection** – 10–15 min
2. **Full Team Share** – 20–25 min
3. **Small-Group Application** – 15–20 min
4. **Collective Commitment & Next Steps** – 10–15 min

Page 1: Individual Reflection — My Personal Perspectives as a Leader (Write freely – be honest and specific)

Agency (Me Story) How do I currently exercise autonomy, creativity, and impact in my leadership role? Where do I feel most like the hero/doer/creator?

Belonging (We Story) How do I experience (and give) support and connection in our leadership team? Where do I feel truly needed?

Cause (Thee Story) How does my leadership connect to the bigger mission—developing advisors, building practices into firms, protecting NM families and legacies?

Page 2: Small-Group Application — Break into pairs/trios. For each ABC, discuss and capture concrete ways we create/reinforce it.

For Our Internal Leadership Team

Agency (Me): How do we give ourselves real ownership and creativity?

Belonging (We): How do we make every leader feel supported and needed?

Cause (Thee): How do we connect our leadership work to the larger purpose?

For the Rest of the Office (Advisors & Staff)

Agency (Me): How do we help new advisors, mid-career, and career advisors feel ownership

Belonging (We): How do we build true connection

Cause (Thee): How do we link daily work to legacy-building and firm value?

Page 3: Collective Commitments

Our Leadership Team Commitment

How we will live Agency:

How we will build Belonging:

How we will serve our Cause:

Office-Wide Actions This Quarter (one per ABC)

One Action I Will Take This Week:

Team Check-In Date: