

**Dare to Care®**

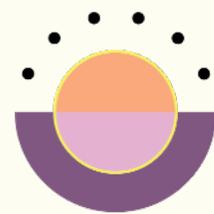
A decorative graphic in the top right corner featuring a stylized fern frond in shades of green and yellow, with several small yellow and orange dots scattered around it.

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# **Role of the Advisor in a Fractured World**

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**Workshop**



**Courageous  
Being**

# Psychological Anthropology Applied in Finance

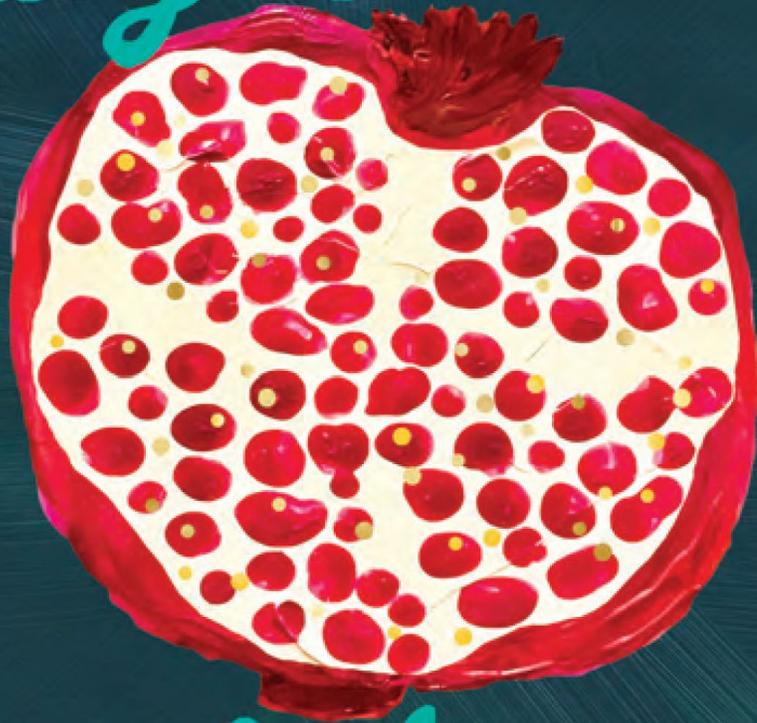


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1. OBSERVATION
  2. DIALOGUES
  3. ANALYSIS
- INNOVATION
-

# **Field Notes from a Fracture**



Begin



Within

## Begin Within



**The world urges you to chase external goals, but real fulfillment starts inside. Before rushing into action, pause and turn inward. Get to know yourself first. Notice the emotions, beliefs, and thoughts quietly shaping your experience. Meet your own needs before tending to others. From that place of clarity, take action with purpose.**



## **Release and Renew**



**A new beginning is here, inviting you to clear space, inside and out. When you release stagnant patterns and old scripts, you make room for something greater. Tidy your world with intention, from your mind to your desk to the quiet corners of your heart.**

**Let go of what weighs you down.**

**Embrace what lifts you higher.**



## **Change the Patterns**



**When painful challenges arise, notice how old, negative patterns take over. Do your thoughts spiral into fear, doubt, or frustration? Does your mind make things harder than they are?**

**Recognizing the pattern is the first step. Instead of feeding stress, choose a new response. Every choice is a chance to reframe the story, shift your perspective, and create a new pattern.**



# Health Is Wealth

.....

**Health is your most profound resource, the rooted foundation from which everything flows. When you honor and protect it, you step into abundance. Tending to your health is a sacred practice. Every choice, every breath, every moment of care is a seed planted for a future of vitality and strength. That vitality is priceless. You can't buy it. You can't borrow it. You must grow it, daily, with love.**

# **The Culture of Fracture**



# Living in a fractured American society



# Fracture | Extreme Threats: Can't shake the feeling that 'Black Swan' events are normal

DESTABILIZED

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PANDEMIC '20

FINANCIAL CRISIS '08-'09

EXTREME  
EVENTS

---

WILDFIRES

HURRICANES

FLOODS

VIOLENCE

---

POLITICAL VIOLENCE

MASS SHOOTINGS

# Fracture | Chronic Transitions: More stress from major changes underway

## TRANSFER OF POWER, AUTHORITY & WEALTH

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SUCCESSION OF  
DOMINANT  
BABY BOOMER GEN  
  
CHANGE IN DECISION  
MAKERS

## TECH CHANGES

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AI, ROBOTS  
& DIGITIZATION  
  
SCREEN DOMINANCE  
IN DAILY LIFE

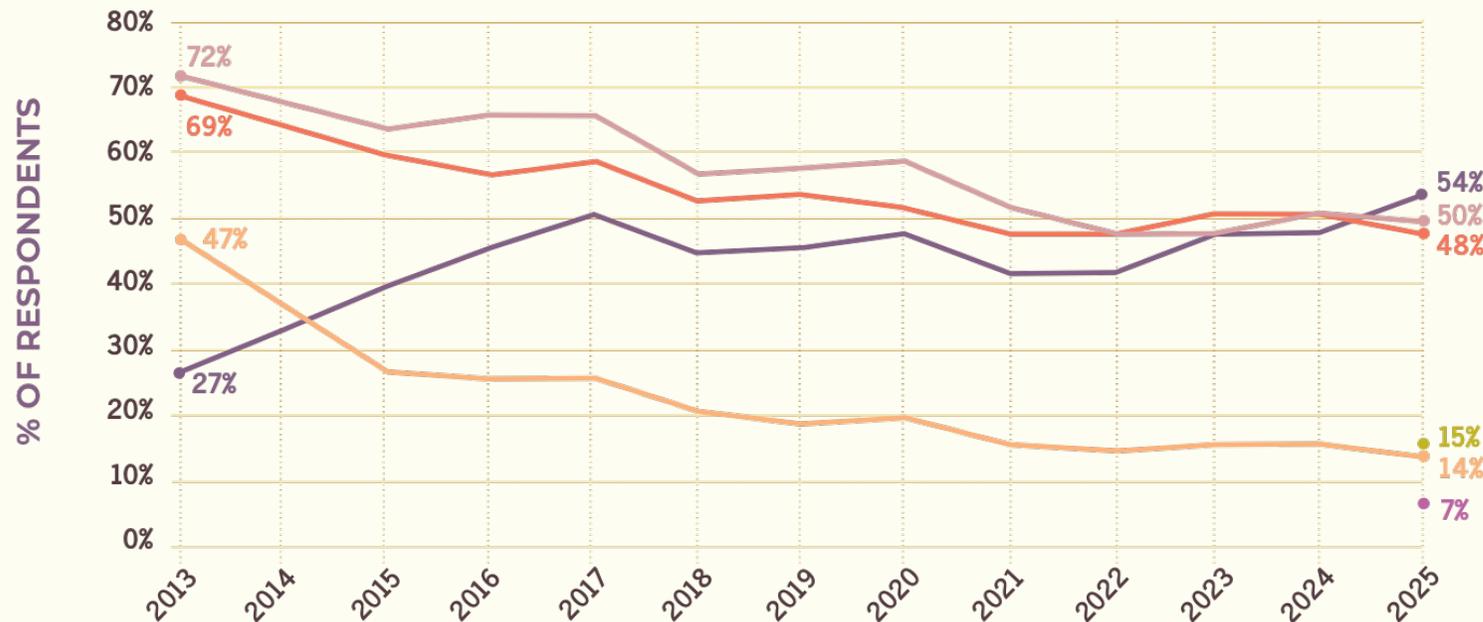
## SHIFTING & TRENDS

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CRYPTO  
  
FINTECH RISE  
  
DECLINE OF TRUST  
IN STOCKS & BONDS

# Fracture | Polarized Views + Echo Chambers: In news/media bubbles, information is siloed

PORTION THAT USED EACH AS A NEWS SOURCE IN THE LAST WEEK

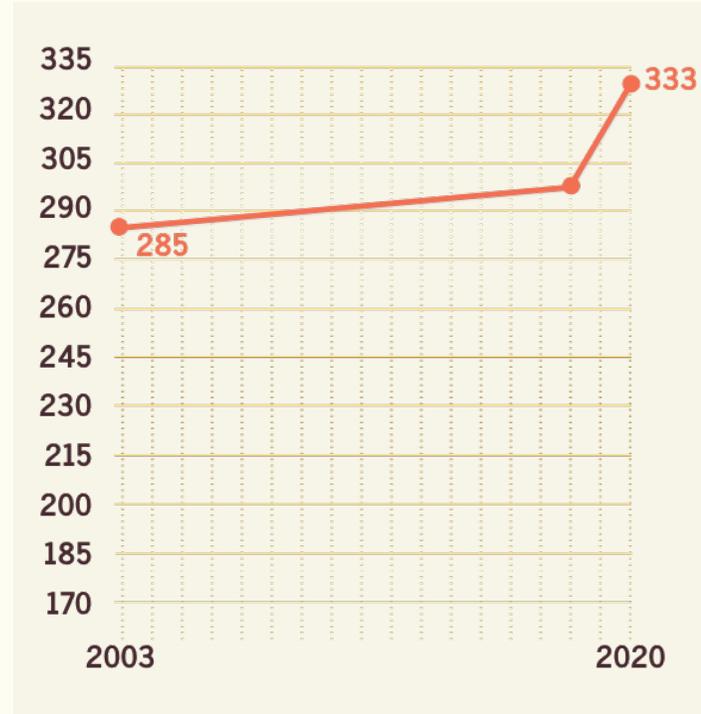


MAJORITY OF AMERICANS GET NEWS FROM ALGORITHM-DRIVEN SOCIAL MEDIA SOURCES

# Fracture | Isolation: Americans are increasingly isolated from one another

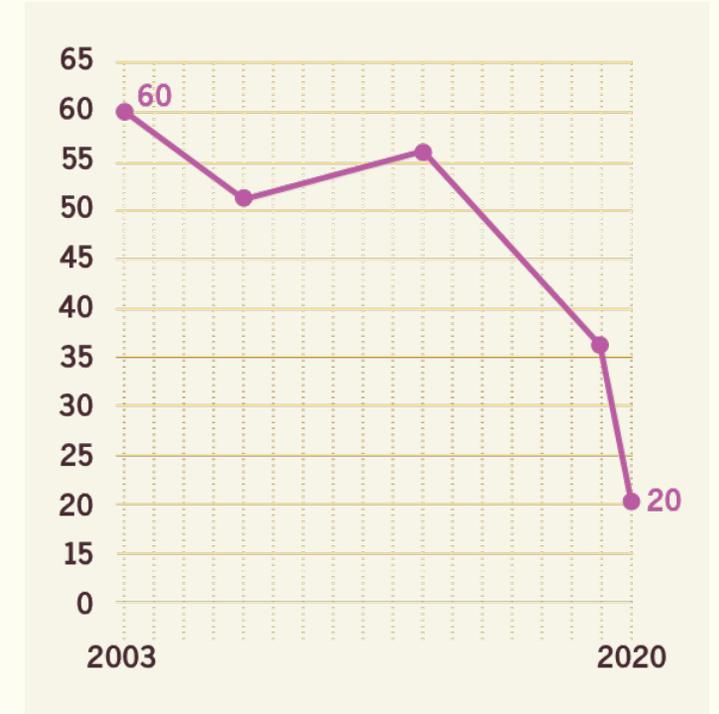
The U.S. Surgeon General declared an epidemic of loneliness and isolation in 2023.

Americans are spending more time alone...  
and less time with friends



**SOCIAL ISOLATION**

**increased 24 hrs  
per month**



**SOCIAL  
ENGAGEMENT  
W/ FRIENDS**

**decreased 20 hrs  
per month**

# Fractures continue to feed distrust in institutions

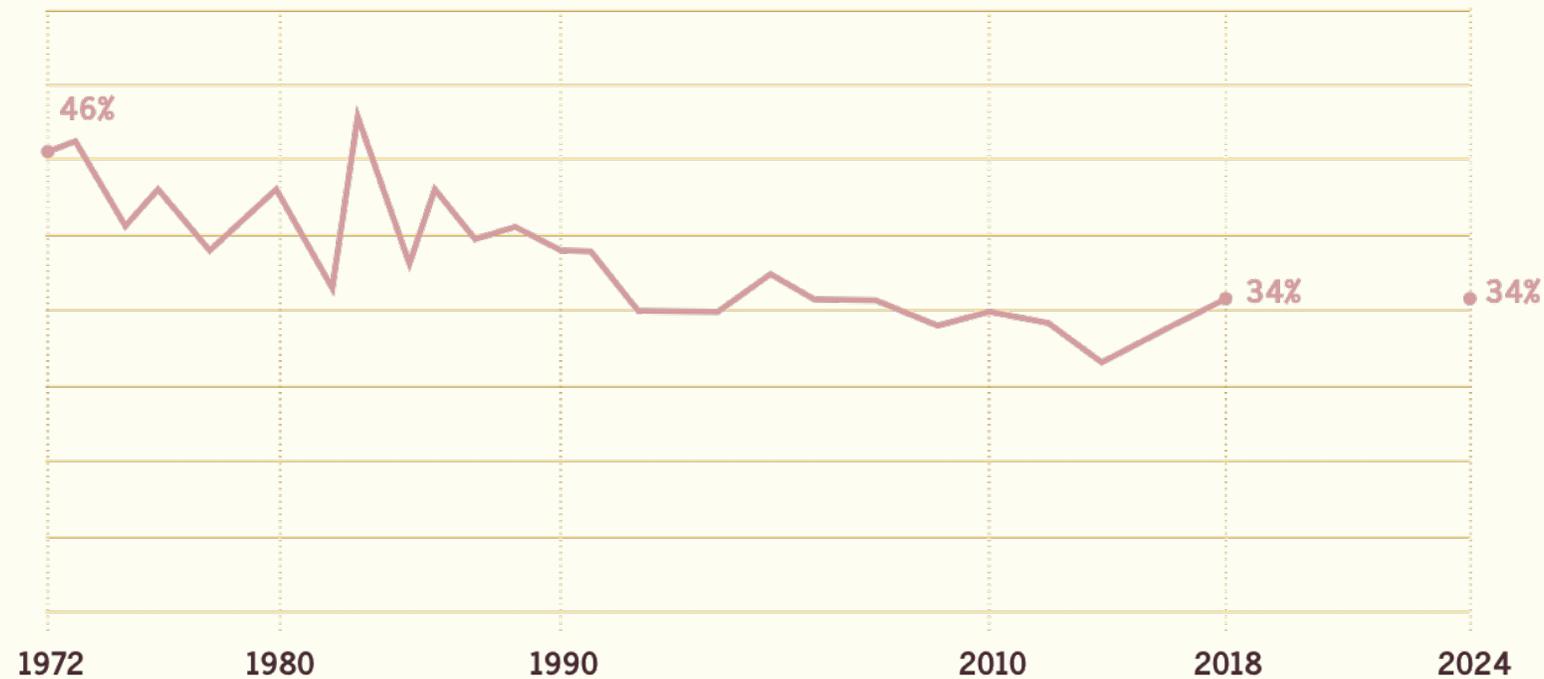
AVERAGE CONFIDENCE IN MAJOR U.S. INSTITUTIONS  
1979-2025



TRUST IN  
MAJOR U.S.  
INSTITUTIONS  
HAS  
PLUMMETED

# Among fractures, low levels of trust generally

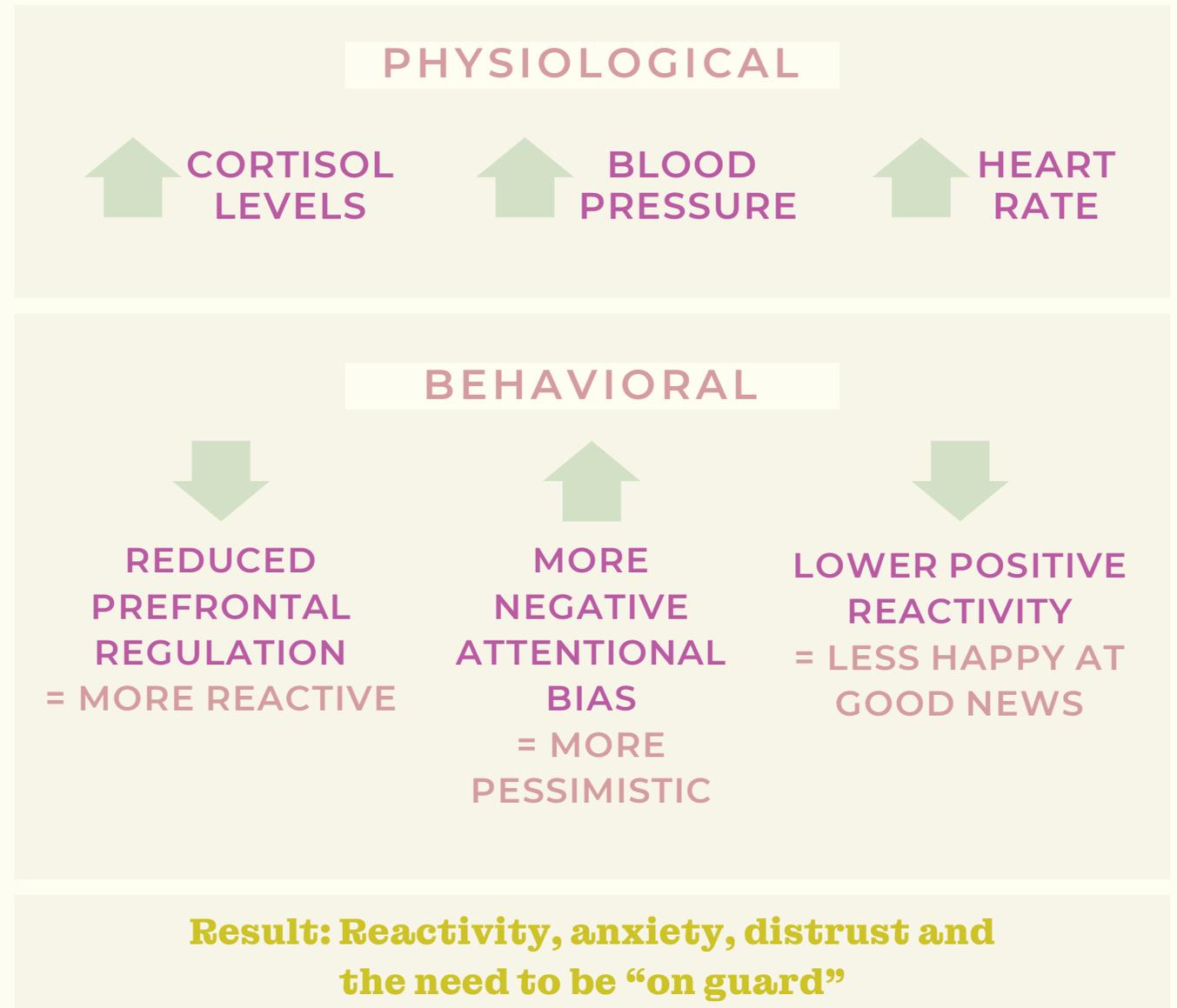
% WHO SAY THAT MOST PEOPLE CAN BE TRUSTED



ONLY A THIRD  
OF AMERICANS  
THINK MOST  
PEOPLE ARE  
TRUSTWORTHY

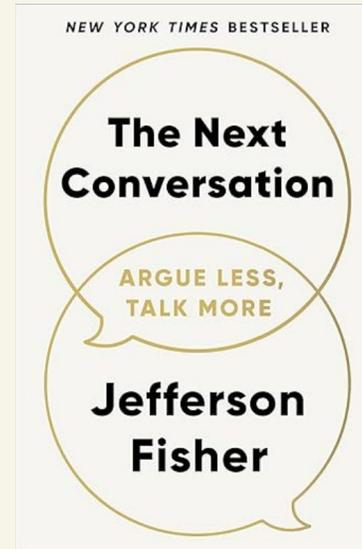
# Toll: Acute and chronic stressors leave measurable effects

Researchers have found robust evidence of the physiological effects of stress, but also the added emotional impacts: more reactivity, more pessimism, and less happiness amid good news.

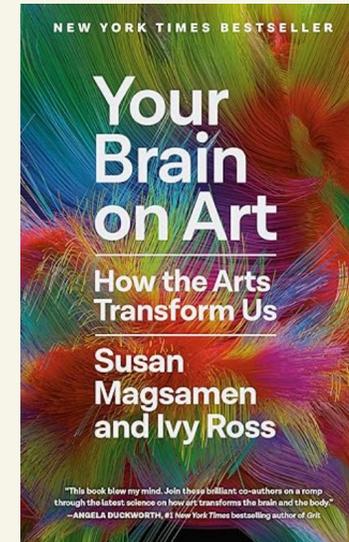


# What mends the fracture: conscious communication, creativity, wise + brave action

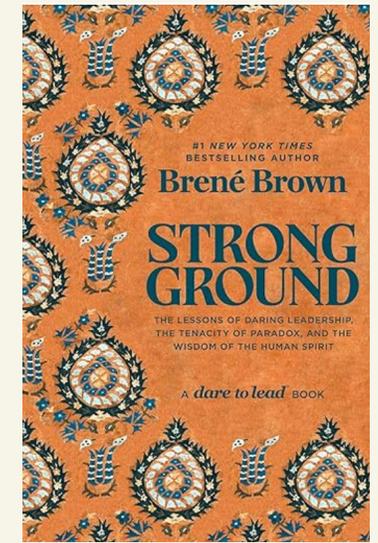
Studies also show that mindfulness, emotional expression, and purposeful action improve heart-rate variability, lower cortisol, and strengthen brain networks that support regulation and resilience.



↑  
COHERENT



↑  
CREATIVE



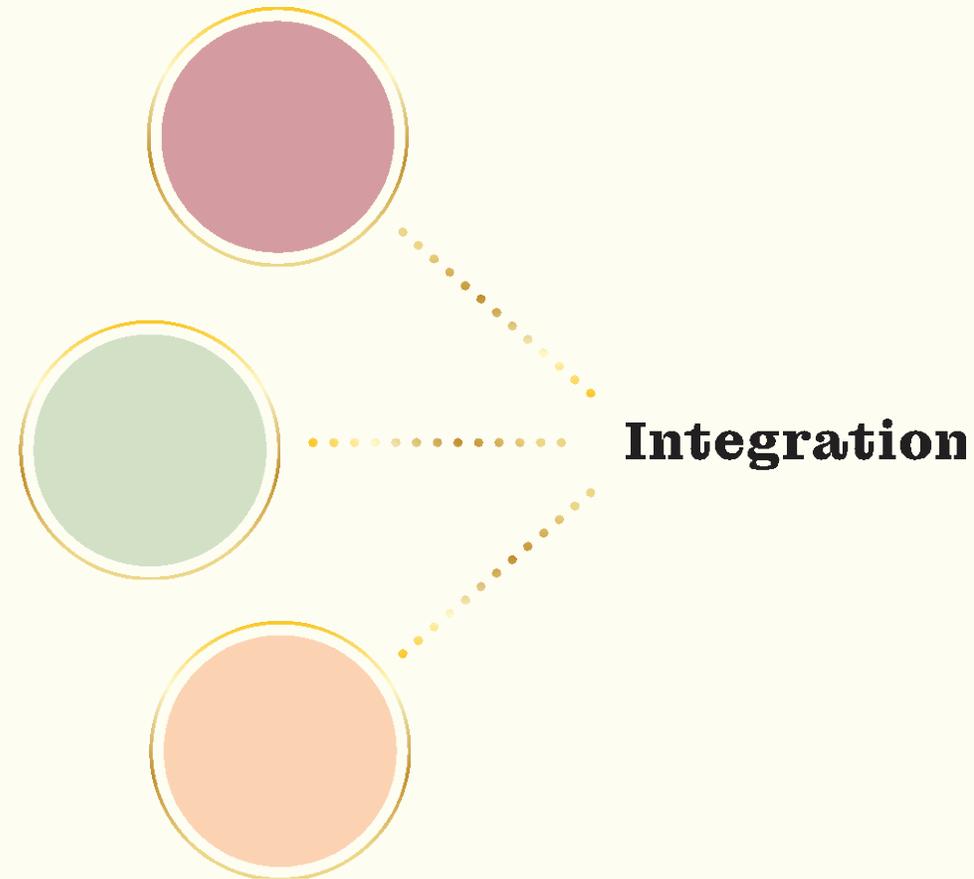
↑  
COURAGEOUS

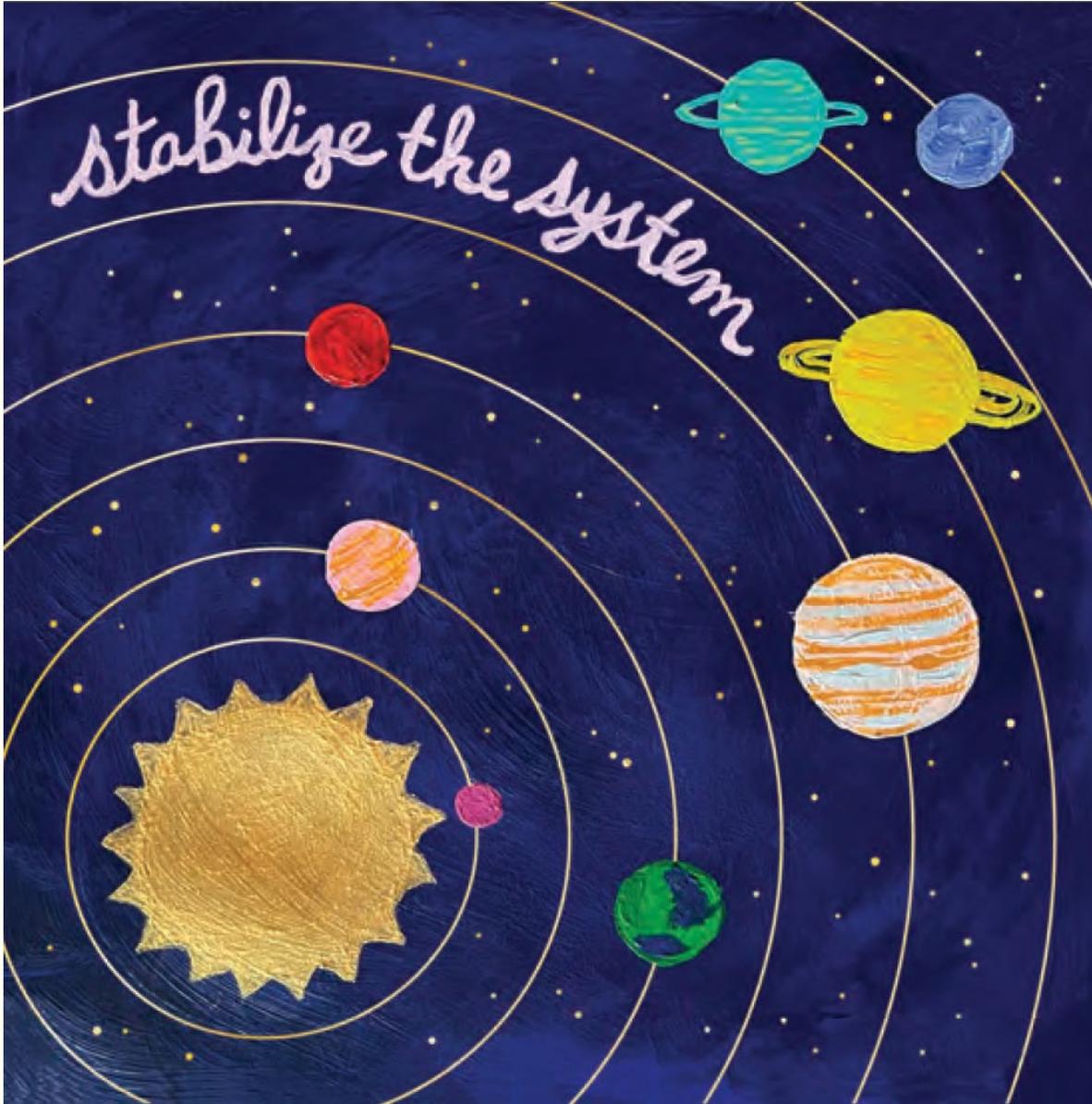
**Realignment: Brain, heart and gut wisdom working as a team. All 34 senses are engaged.**

# In a fractured world, Advisor is Custodian of Alignment

By maintaining alignment, their own and their client's, advisors preserve the integrity of the whole: financial, relational, and emotional side of transitions.

Disjointed system can then mend correctly, so the next phase of growth is strong, not brittle.





## **Stabilize the System**



**Your body is its own solar system, each part working in harmony to keep you steady. Your breath is the unifying force, your nervous system holds everything in orbit, your digestion fuels the core, and your circulation carries life, like cosmic currents. When outer forces pull at you, return to your center, replenish, and move with care so your system can stay in smooth alignment.**



## **Make It Easy**

.....

**Embody quiet wisdom and embrace the art of ease. Release the unnecessary struggles and complexities. Find your sanctuary in simplicity. Take the path of least resistance. Rest when you need to, and approach life with a soft, gentle heart. You don't have to carry the weight of the world on your shoulders. You can carry only what's truly important.**



## **Lead by Example**

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**Live your values rather than preaching them. If you want to inspire change, embody what you believe. Stand by your convictions, even when it is difficult.**

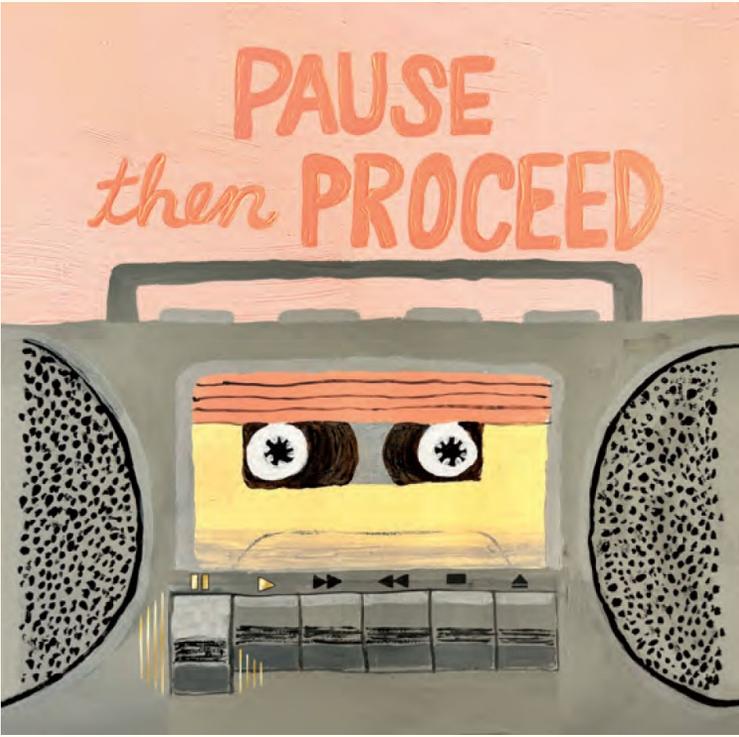
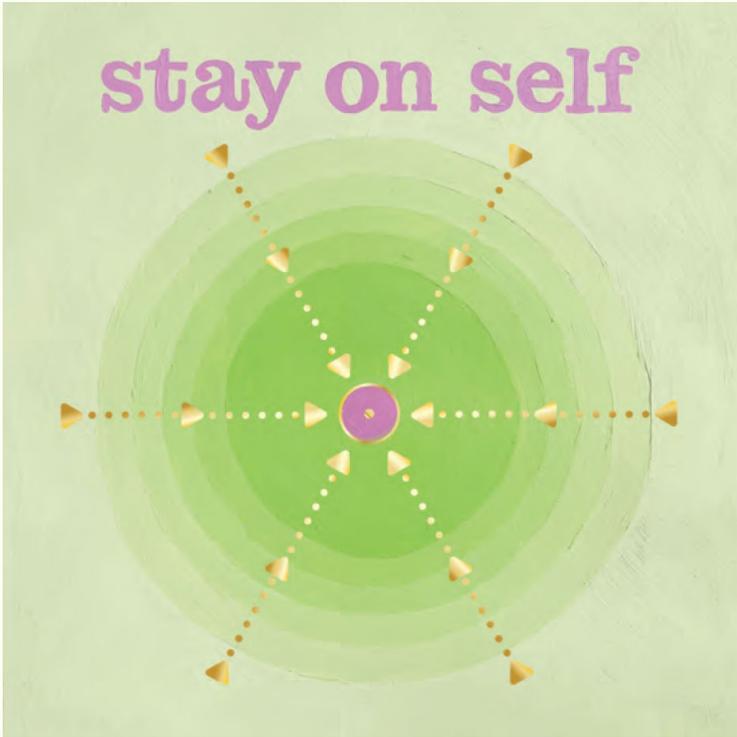
**Love is the strongest, bravest force in any endeavor. It may go unnoticed, but it always shapes the world around you. Lead with love and let your presence create the change that words alone cannot usher.**

# **Courage Cards**

## **Experience 1**



# Find these three cards in your deck:



# **Courage Cards**

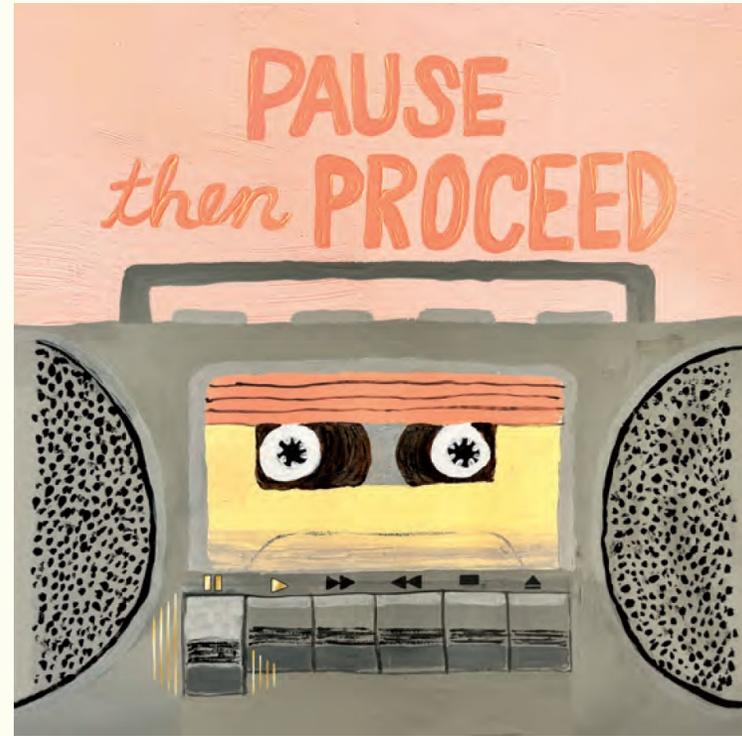
## **Experience 2**



# Advisors: remember the three cards



SUBJECT – OBJECT – SUBJECT



ONE EYE ON THE INSIDE



HEART COHERENCE

**Clients: choose two cards to show:**

**1) how you feel right now +**

**2) what would be good for you in this meeting**



# **Courage Cards**

## **Experience 3**



**Icebreaker:  
Pull a card at  
random, invite  
free association**

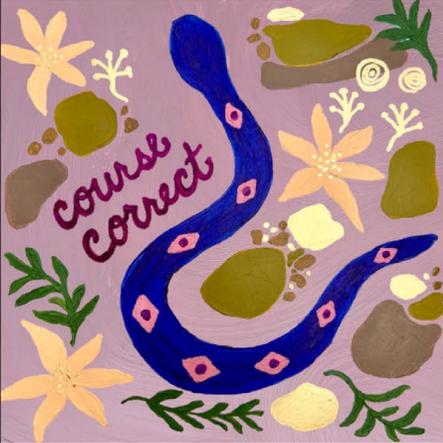
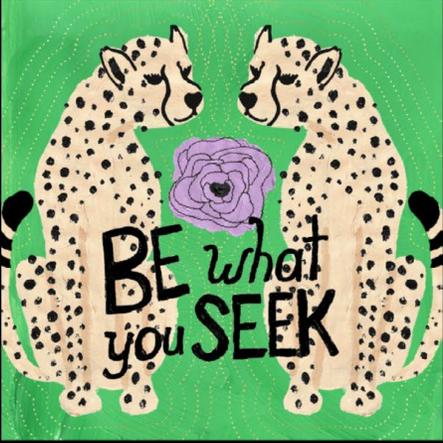
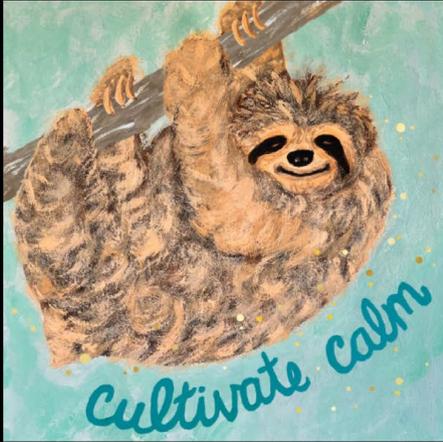
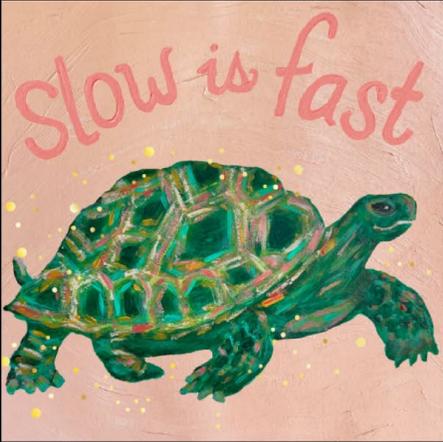


# **Courage Cards**

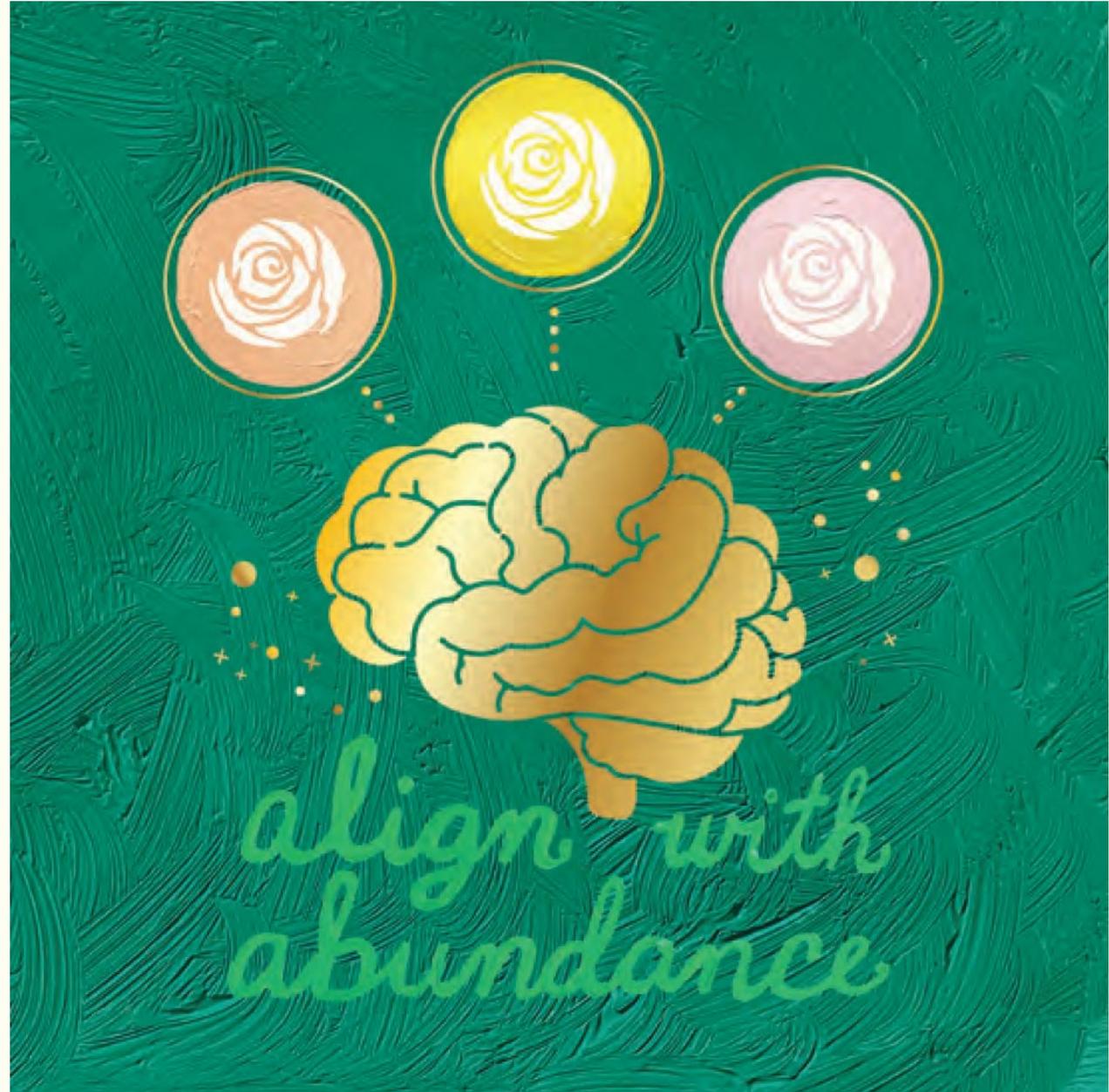
## **Digital Experience**



# Client Prompt: How Do You Feel?



# Protip: Bedazzle the Agenda



# **Bonus: Mini Deck Prompts for Client Decisions**





## **Not Now**



**Tune out the cacophony of everyone's inputs and take a step back. Even when others urge you to move forward, listen to your inner wisdom. If you hear a "No," trust it. "Not Now" is not the same as "Not Ever." Today, acknowledge that some doors are meant to remain closed, allowing space for clarity to emerge.**



## **Not Yet**



**Stand at the edge of what's to come but hold back from rushing. "Not Yet" isn't a "No," it's about taking more time to prepare. Use this moment to check in with yourself and get clear. The perfect time will appear when everything aligns.**

**Until then, focus on setting the foundation for what's next.**



## **Maybe Later**



**Give yourself the freedom to stay open without making a final decision. You don't have to commit right now, or retreat. "Maybe Later" is about letting things unfold. Stay open to the possibilities, and when the path becomes clearer, you'll know when it's time to move forward. If not, something better will emerge in its place.**



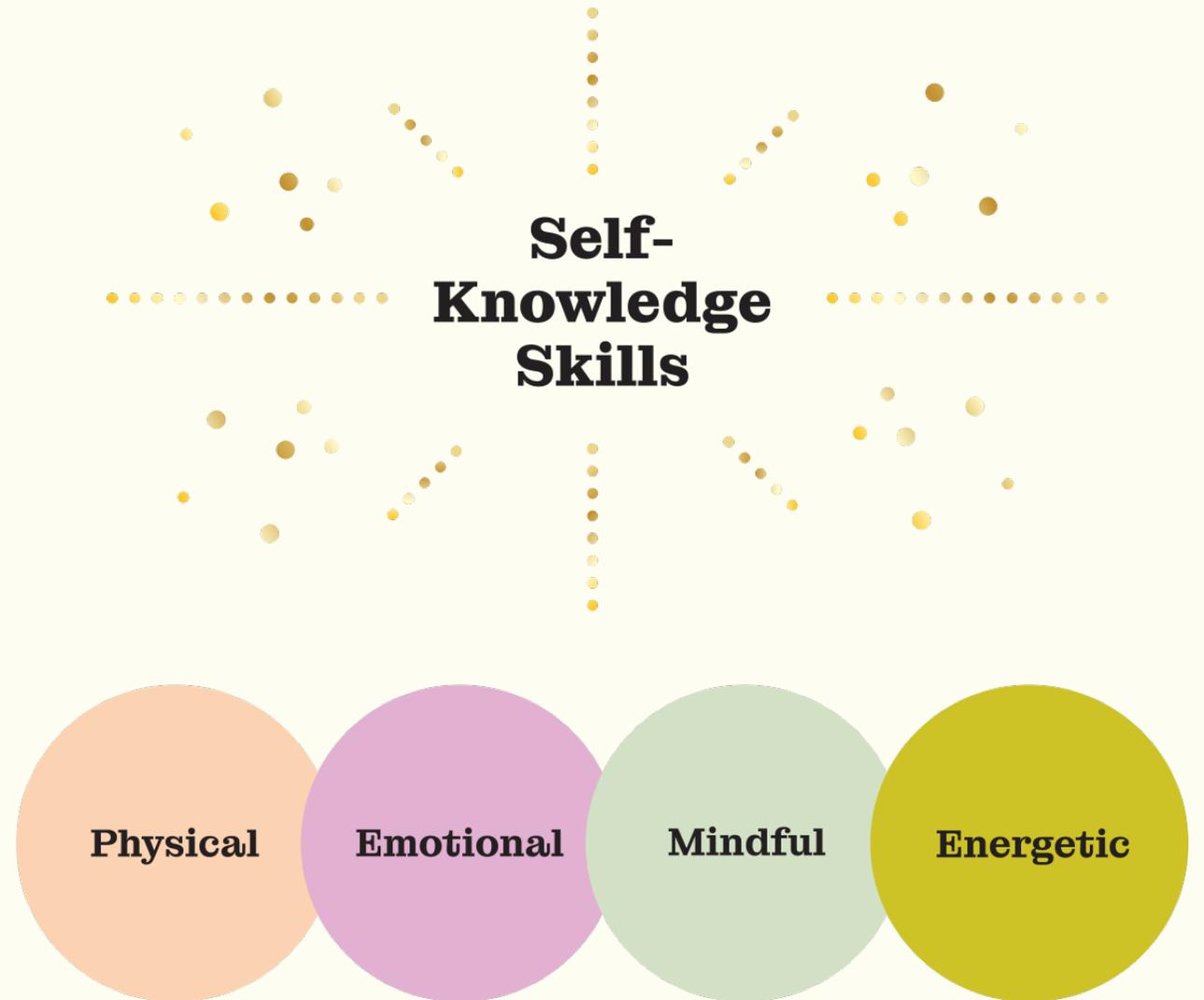
## **Yes Let's**



**This is your call to act with confidence and excitement, joy, and readiness. Step into the experience with a sense of adventure, and trust that an exciting journey will unfold, even if the full picture isn't clear. Embrace the energy of newness and move forward with purpose and enthusiasm.**

# **Business works better when people aren't robots**

Courage cards are one example of a structured technique to help clients align their fractured energy into a calm, connected interaction. Connect with us for more ways to apply conscious leadership solutions with your clients



The background is a soft, warm peach color. It features decorative elements including a large fern frond on the left side, a smaller fern frond on the right side, and a cluster of gold dots and small crosses in the upper center. The text is centered and reads:

THE  
COURAGEOUS BEING  
DIFFERENCE

**Success follows when you self-align**

When you are a Courageous Being, you are  
centered, intentional and adaptable.

**[clientcare@courageousbeing.com](mailto:clientcare@courageousbeing.com)**

# Thank you



CONSCIOUS LEADERSHIP CENTER

INDIVIDUALS / TEAMS / RETREATS

SPEAKING / RESEARCH

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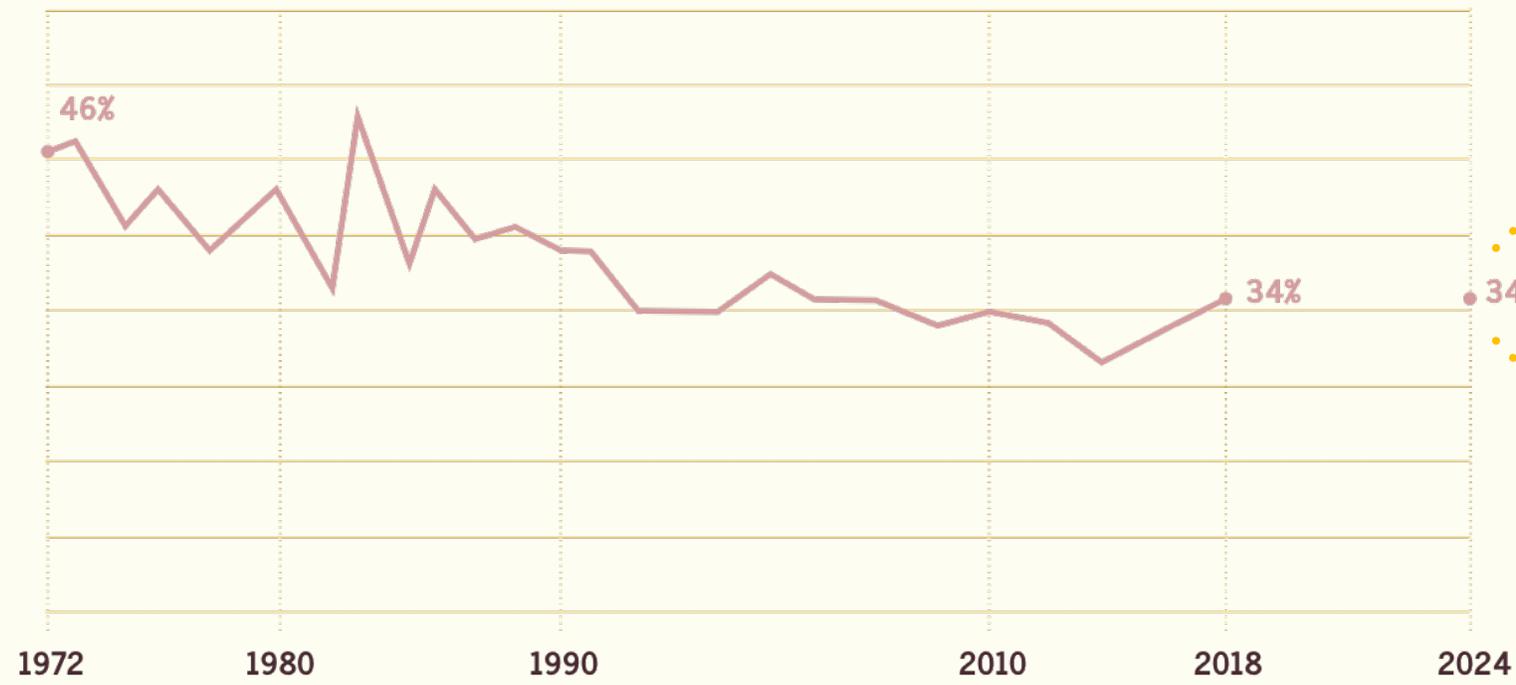
[COURAGEOUSBEING.COM](http://COURAGEOUSBEING.COM)

# Appendix



# Among fractures, low levels of trust generally

% WHO SAY THAT MOST PEOPLE CAN BE TRUSTED



## HIGHER TRUST:

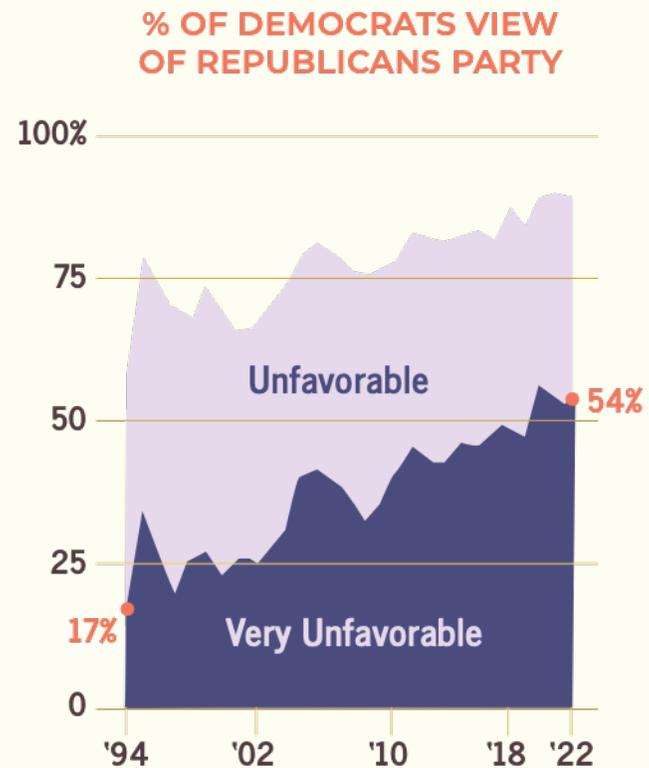
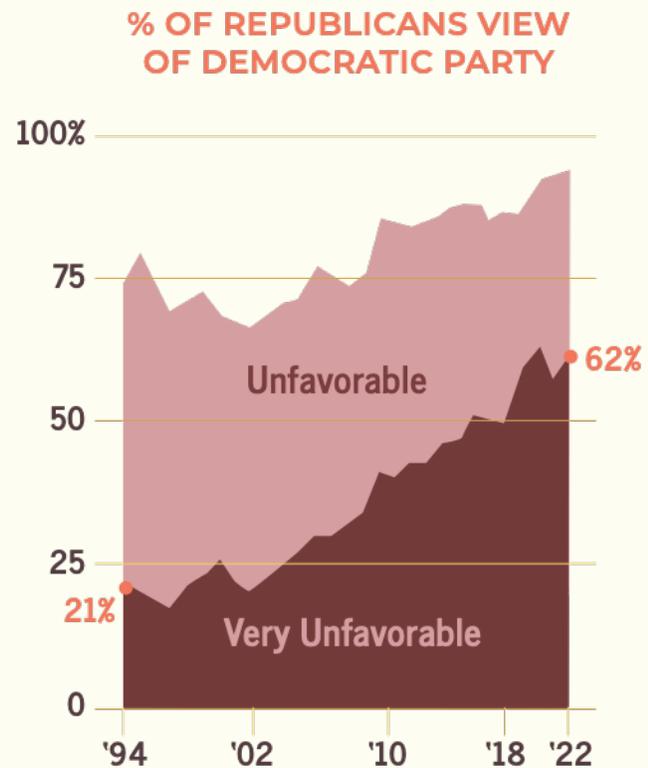
- HIGHER INCOME
- HIGHER EDUCATION
- WHITE OR ASIAN
- OLDER
- KNOW THEIR NEIGHBORS
- NEIGHBORS "LOOK LIKE ME"

## LOWER TRUST:

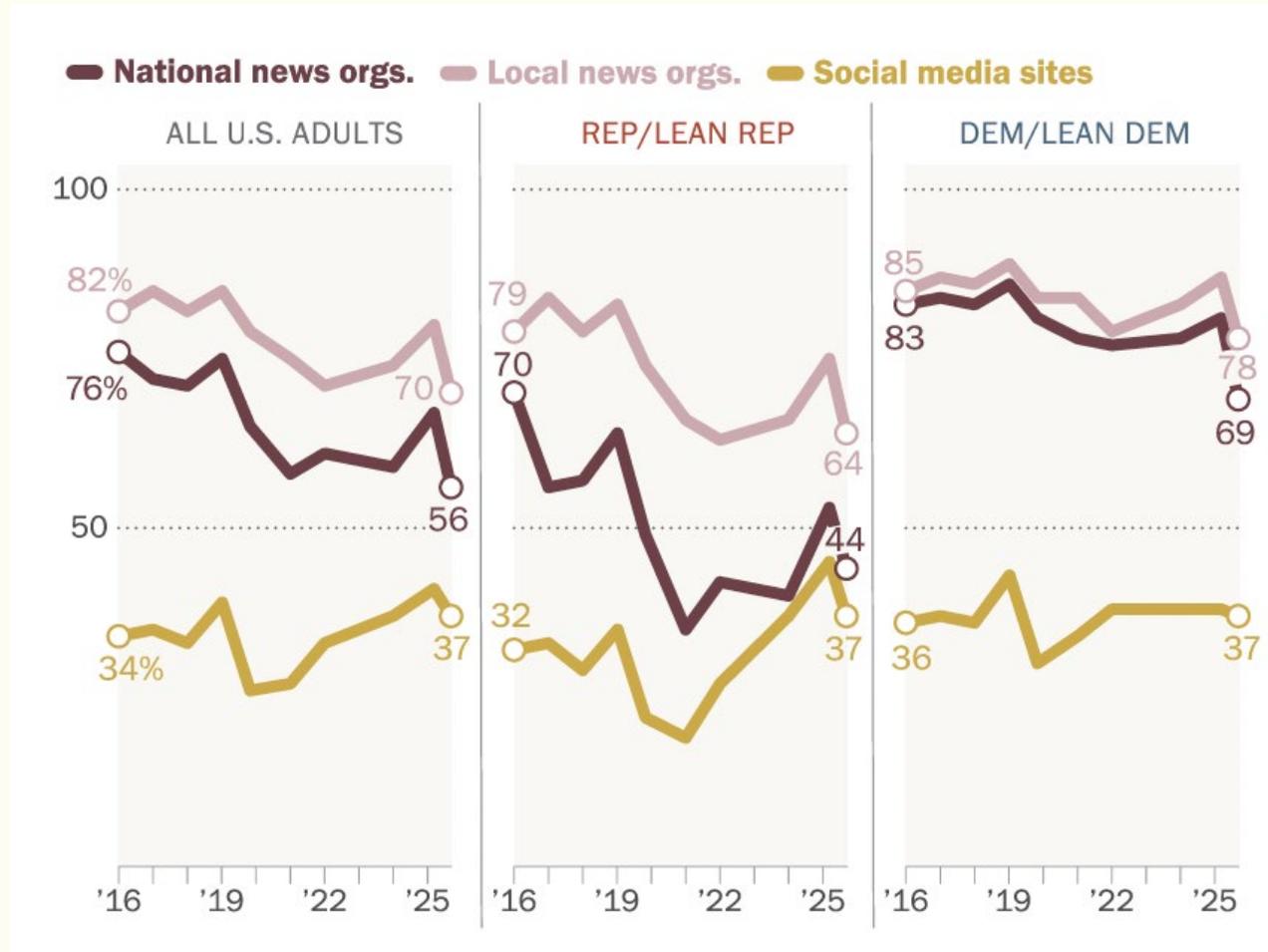
- LOWER INCOME
- LESS EDUCATION
- BLACK OR HISPANIC
- YOUNGER
- FEWER KNOW NEIGHBORS
- SAY NEIGHBORS "DON'T LOOK LIKE ME"

# ...amplifying polarization of our differences

## TWO DECADES OF RISING PARTISAN ANTIPATHY



# Fracture: In news/media bubbles, our information is siloed



# Mending the fracture: Plan for connecting and grounding in interactions

Courage cards are one example of a structured technique to help clients align their fractured energy into a calm, connected interaction.

ACTIVATED



STUCK "IN YOUR HEAD"

RUMINATING

ALONE

CHAOTIC THOUGHTS

GROUNDED



PHYSICAL / SENSORY  
INTERACTIONS IN  
HERE & NOW

PRO-SOCIAL  
CONNECTION

BUILDING TRUST

CAN BEGIN TO SEE  
& SORT THOUGHTS

## SOURCES:

### SLIDE 12:

Reuters Institute Digital News Report

<https://reutersinstitute.politics.ox.ac.uk/digital-news-report/2025/dnr-executive-summary>

### SLIDE 13:

The U.S. Surgeon General's Advisory on the Healing Effects of Social Connection and Community (2023)

<https://www.hhs.gov/sites/default/files/surgeon-general-social-connection-advisory.pdf>

### SLIDE 14 + SLIDE 42 + SLIDE 43:

Gallup Poll: Democrats' Confidence in U.S. Institutions Sinks to New Low (7/2025)

[https://news.gallup.com/poll/692633/democrats-confidence-institutions-sinks-new-low.aspx?utm\\_source=chatgpt.com](https://news.gallup.com/poll/692633/democrats-confidence-institutions-sinks-new-low.aspx?utm_source=chatgpt.com)

### SLIDE 15 + SLIDE 41:

Pew Research Center: Survey on Trust (5/2025)

<https://www.pewresearch.org/2025/05/08/americans-trust-in-one-another/>

### SLIDE 14:

Kelly McGonigal, *The Upside of Stress: Why Stress is Good for You, and How to Get Good at It* (New York: Avery, 2015)

Pete Walker: *Complex PTSD: From Surviving to Thriving: A Guide and Map for Recovering from Childhood Trauma*

Richard Mackenzie & Peter Walker: *Stress Tested: How the New Science of Stress Hormones Can Transform Your Health* (2025)

### SLIDE 17:

Jefferson Fisher: *The Next Conversation* (2024)

Susan Magsamen & Ivy Ross: *Your Brain on Art: How the Arts Transform Us* (2023)

Tara Swart: *The Source: The Secrets of the Universe, the Science of the Brain* (2018)

Tara Swart: *The Signs: Decode the Messages from Your Body, Universe, and Intuition* (2020)

John Mackey, Steve McIntosh & Carter Phipps – *Conscious Leadership: Elevating Humanity Through Business* (2020)

Brené Brown – *Strong Ground: The Lessons of Daring Leadership, the Tenacity of Paradox, and the Wisdom of the Human Spirit* (2025)

## SOURCES:

### SLIDE 23 + SLIDE 25:

Morter, S. (2019). *The Energy Codes: The 7-Step System to Awaken Your Spirit, Heal Your Body, and Live Your Best Life*. Simon and Schuster.

### SLIDE 41:

Bank of America Private Bank Study of Wealthy Americans (2024)  
[https://mlaem.fs.ml.com/content/dam/ML/Articles/pdf/Study\\_of\\_Wealthy\\_Americans\\_WhitePaper.pdf](https://mlaem.fs.ml.com/content/dam/ML/Articles/pdf/Study_of_Wealthy_Americans_WhitePaper.pdf)

### SLIDE 43:

Pew Research Center: How Americans' trust in information from news organizations and social media sites has changed over time (10/2025)  
<https://www.pewresearch.org/short-reads/2025/10/29/how-americans-trust-in-information-from-news-organizations-and-social-media-sites-has-changed-over-time/>