**Modern Financial Wellness: Aligning Your Purpose With Your Profession w/ Kim Jones**

**Jim Grace**

Welcome to Modern Financial Wellness, the podcast dedicated to helping you feel better about your finances.

I'm your host, Jim Grace and I'll be your guide as we discuss the psychology of money and explore the emotional aspects that shape our financial decisions and how we feel about them.

A quick note before we start. Although, I do hope that you find the information on this show to be helpful, in no way are any of these discussions to be taken as specific Financial Advice.

Please do your own research and talk your own advisors, especially when making important financial decisions.

**Jim Grace**

All right, Kim Jones, thank you so much for joining me on Modern Financial Wellness! How are you?

**Kim Jones**

I'm doing great, how are you?

**Jim Grace**

I'm doing really well! I'm really excited to talk to you today about your work and the work that you do with clients.

Because I see it on my end of things as a financial planner, this idea of our high level conversation being around finding purpose in a career or some version of that.

Often clients will come to me and present a financial concern where they don't feel like they have enough or they're not doing enough. As I get to know them, over a longer period of time, sometimes I find that the root cause of how they're feeling really has to do with where they are in their career life and that they don't feel quite fulfilled or don't have a lot of purpose.

They just don't generally feel like they're in the right place anymore and where do they go from there and how do they sort out where they want to be in their life. That is something that I don't think there's a lot of good frameworks or coaching around and I think it's something that people struggle with in silence. I think more people are dealing with this topic, than we realize.

This was a long-winded introductions to say thank you for being here and I'm excited to talk to you about your work.

**Kim Jones**

Yes and I'm excited to be here too, Jim. I second all your comments. This is a challenge that many people face at one point or another in their career and often they don't have the resources to work through those challenges on their own, so it's an issue that I feel deeply passionate about, having also gone through my own massive career transition about seven

years ago. So it's an issue that's very near and dear to my heart.

**Jim Grace**

If you don't mind, I think that's a great segue. Can you explain to people a little bit about your background and your story how you went from Corporate America into coaching on the career side? What did that look like for you? I think it's really good context for the conversation that we're about to have.

**Kim Jones**

I have a 25 year corporate career. I started my career with an MBA in finance and spent a lot of years trying to find a place that felt like home in Corporate America. I was always challenged, I felt like it was great for developing my skills and being engaged in problems that were interesting, but it never really felt like home.

The way I manage that was I made my way around a number of different companies and functions over the time that I was working in Corporate America. I went through Finance operations, ultimately landed in it 15 years before I left corporate.

I was already at a senior leadership role, so I came over into the space with a focus on large scale systems transformation and running it like a business. That was a really fun and interesting job, but again it didn't really feel a whole lot like it was playing to some of the more authentic parts of what I was interested in doing.

**Jim Grace**

Did you get any coaching or assistance with that or were you just on your own, intuitively trying to find a place that felt like Home, to use your words.

**Kim Jones**

More or less doing it intuitively. I was someone who got restless when I wasn't feeling fully engaged or I was deriving a lot of meaning out of my work. I looked around at what else was out there and I had a very strong work ethic, so lots of opportunities presented themselves to me along the way.

I was fortunate to make my way up the career ladder and I kept thinking that if I have more influence, if I'm in a greater position of power, if I'm doing something that's more impactful to the direct company Mission, maybe then I'll feel like I have the equation right for me.

**Jim Grace**

That happens to be common story where a lot of really driven and successful people aren't feeling good about where they're at, so they just work harder and go after promotions or accomplishments, thinking it's going to create that feeling. And that didn't happen for you, it sounds like.

**Kim Jones**

Yes, it did not happen for me and not only that it took me a very long time to really identify that as a Fool's errand, that there was a pattern there and that, as many moves as I was making, it still wasn't bringing me any closer to what I was looking for and actually got me further away from feeling like I was making big impact.

When I was in IT, I came to a senior leader level. I was most recently in a division Chief Information officer role for Farmers Insurance Company, heading up a very large part of their IT function and engaged in big Systems Transformations.

This was a highly political, highly time-consuming job, very stressful and it was in this role where it finally clicked for me to see what the constant movement and the desire to have more impact was not solving the problem.

I was consumed by unfulfilling work, and it took a scary leap to see that whole life was consumed with work and it's not work that I was finding to be meaningful and fulfilling.

It was an interesting dilemma, because I had worked for this. It was what I had set out to do and to find myself at a point where I was thinking that I was not sure this was it.

And it seemed that now my only options were to suck it up and just know that it's not going to be solved with another move, or I can do something pretty bold and try something else.

I feel like I was forced a little bit into the decision to leave because of some things that were going on in my personal life, that required my attention, and I didn't have the bandwidth or capacity to deal with that and I was in a new leadership structure within the organization that wasn't really working out for me or for the person that I was reporting to.

At the beginning of 2017 I finally made a very terrifying decision to leave the job and I wasn't even conscious, that this unexpected career change would lead to a reinvention, it wasn't a decision that I had planned.

I was in a conversation with my boss and something came up and it was a moment that I knew I cannot do this even one more year, more than I'm doing it now, so in that conversation I surprised myself and him by saying that I thought it was time for me to move on. He agreed, we parted ways, and I was on my own with no idea about what it was that I was going to do next.

I spent a couple of years figuring that out and it was a very terrifying process to be someone who is so focused and has always identified myself through the work that I did, to find myself in a position where I wasn't in a vocation, and I didn't even know what that looked like and had no plans of how to get there.

When I transitioned into coaching, a couple years later, it was with the eye towards helping people in similar situations, navigate that process. And to your point earlier, what was so surprising to me, when I actually left my job, was how many people I connected with who were experiencing similar challenges when I was in my corporate roles. We just didn't talk about that, we just got the job done and moved on.

**Jim Grace**

Right, yes!

**Kim Jones**

I got the job done and I figured that everybody else had figured it out and the problem was me. It never occurred to me that the problem was that I was trying to force my career into a construct that didn't suit me.

I kept looking around wondering what I needed to fix about myself in order to make this work, for what appears to be working for everyone else around me.

Then I came to realize that, actually, a lot of people are struggling with the same issue in silence and that was the first iteration of my coaching business where I was working with people, particularly women, who were facing similar challenges of having invested a significant amount of their blood, sweat and tears into a career that was no longer suiting them.

**Jim Grace**

Right, and you get to this point where it feels like, probably now, what was right and in your case, as you described it, was extremely abrupt.

I anticipated you giving me a little insight into your thought out, mapped out exit, but it was that you woke up one day and it all came to a head and then you were left dealing with big questions about where to go from there and what your identity was.

So that becomes the coaching business to help people like you, that have gone through that, and need some direction and need to sort out where they should be and what that should look like.

How do you get people started on this sooner? Because I feel like a lot of people let this linger for a long time, in your case it sounds like 25 years where you finally got to the point where you're going to take some action. How do we kick this off, what are some of the first signals that people might start to recognize where it might indicate that they're not in the right spot?

**Kim Jones**

When I say it was 25 years, a lot of this started coming to a head towards the end of my corporate career, because my values also started to shift significantly as they do for most people as you go through your 20s, 30s and 40s.

When I was in my 20s and made my decision to pursue the business route, get my MBA and do these corporate jobs, my values were very much aligned around financial stability, having a job that carried good social capital, where there was some safety and security in the work that I was doing.

Those things were really important to me, and I do think my career in my early years very much fulfilled that, even though the work itself wasn't something that was gratifying.

**Jim Grace**

Polls come out continually to back that up, you're not alone in that those goals change over time and typically when we're younger we are wealth and status driven.

**Kim Jones**

100%, and then you find yourself continuing on this path that was set up for that wealth and stability and social capital and then your values start to veer off into a direction of wanting to have meaning and purpose through the work that you do.

Those paths start to get further and further apart and often people don't reconcile them along the way. They don’t recognize that their values are shifting, that they are feeling more called to do purposeful work. They don’t see the changes that they can make now.

Instead, a lot of them do what I did and make this continue to work for them, shove themselves into that box, become that square peg shoving themselves into the round hole.

Then a lot of them get to a point where it can manifest as burnout, like it did for me, or they become so overworked and so unfulfilled that it all changes in the moment of decision.

**Jim Grace**

A lot of people use the term “golden handcuffs”, it gets thrown around a lot, but this is a show about financial wellbeing and a lot of folks are just past the point of no return, or that's at least what they feel like.

Did you struggle with any of that those thoughts about having saved enough, doubts about having done enough, thinking you were crazy, what were you going through in terms of that?

**Kim Jones**

Absolutely and I was fortunate that I did have good wealth impacted lifestyle and career decision-making financial resources, but I also had a certain lifestyle.

The lifestyle I had built justified the job that I had, so I would justify working in the manner that I did by saying that I got to drive the nice cars and take the nice vacations and live in a nice house, but the reality of it was different.

We do start to set up those lives that then become part of the challenge of making a decision in a different way.

When you're looking at wanting to set up more meaningful, purposeful work, the reality of having to have certain levels of finances to support a lifestyle, whether you have kids or you have a mortgage or you're paying off debts, things like that do absolutely come into play and are a factor that need to be considered.

I was lucky and was able to take time with my process, but it's one of the reasons why I think engaging with a coach or having support in that can help, because you can start to make intentional decisions that align with the values you have later in life, meaning and purpose.

You may also have financial goals and values that need to be fulfilled as well and bringing that in and doing a recalibration is important.

You asked about what is the first step in engaging in this process, and it is really understanding where you're at in your life, what's important to you now, what are the non-negotiables that you want to bring into your career and then how big is the gap between where you are and where you want to go.

I like to work with clients on what I call a Soul-Ego continuum. The Ego side of the equation being, and I don't mean Ego like self-concept, but more Ego of the things that help us feel safe and secure in life, money, a stable job, a certain level of comfort in what you're doing on one end of the Continuum. And the other side is more about what is your Soul reason for working, what are those things that might look very different than what's on the other side of the equation.

If you're about meaning and purpose or about stability, like understanding where you are on that Continuum, it is a really important first step in deciding what career you want to pursue next.

**Jim Grace**

That's really interesting, because I think a lot of people think about self-actualization and Maslow’s hierarchy of needs and we're all hardwired to make sure that we're safe and secure and have the things that we need, but then there's also higher levels of that, that get into status within our community and social standing and that always seems to compete with the emotional side your describing using the term Soul.

They're always at odds with each other and it sounds like maybe you're trying to align those two things or at least help people understand where they lean towards.

**Kim Jones**

Yes, it is embracing career change for personal fulfillment, every person is different so when I left my career, I was very much on the Soul’s side of the Continuum.

I could no longer do work just to collect a paycheck and to say that I have a nice job, some people are very much focused around what they need to continue to earn a certain amount of income. I was willing to make tradeoffs in terms of what was really meaningful for me and others may just make some tweaks in their career, maybe they're in a different industry or a slightly different role learning some new skills, but building off of what they largely already have.

In my case it was a complete career pivot, where I had to really grapple with the idea of being a senior level executive and a fortune 250 company and then becoming a coach.

I had my own doubts about whether that was prestigious enough for me to pursue and I had to really work through my own limiting beliefs about what it meant to do this different type of work after I had done all this other stuff, and that I needed it to be something that was a little bit harder to achieve.

**Jim Grace**

Did you battle any social comparison? Were you hesitant to come out with that where you felt concerned about how your former colleagues were going to look at you when you said you were going to become a coach?

**Kim Jones**

100%, as a matter of fact it took me 2 years to update my LinkedIn profile.

**Jim Grace**

And claim the fact that you were already coaching?

**Kim Jones**

Yes, and I was already coaching and I was actually on the path of becoming a coach and when I actually finally launched my coaching business was when I when I made the update, but I really had this idea in my head that a lot of my former colleagues would look at that and say “You know what happened to Kim?! Remember when she was in this role or that role… “ and I find that's the case with a lot of my clients.

The thing that they really want to do, the reason they may not be pursuing it, is because it doesn't carry the same level of Social Capital as the thing that they're doing already.

Thinking about people, who want to do work in nonprofit or have a social cause or something that's maybe involved in human development or the Arts and Creative work.

People often get messages early on that it is not the way you make a living and it's not something that is valued in our culture and society and that can become a reason that people gravitate towards work that doesn't fulfill them and then, over time, what happened to me tends to happen to them, which is they find themselves saying “you know, this is not for me and I'm at the point in my life now where my values have shifted to the point that I'm going to need to start looking at something different”.

**Jim Grace**

Yes, it's really interesting point of all of this and I'm curious about your thoughts, do people ever lean towards safety and social status and they just resign themselves to the fact that they're going to have to stay in a certain lane for income or status or whatever it is their career?

Do you find that they can find other outlets to fulfill purpose and meaning? Does that ever work? Do you try to do that, rather than trying to make it all work?

It sounds like some people go down that path where they think they have to stay in their career, but they end up burning out or just hitting a brick wall at the end of that and it's like how do you again reconcile those two things?

**Kim Jones**

Yes, what I consider success with my clients is when they understand how they're making decisions and then, whatever decision they make, if it's the right choice for them at that particular moment in their life, I call that success.

So to answer your question, I've had many clients who will come in saying “I'm just not feeling fulfilled in the work that I'm doing” and then we go through the assessments that I do with them to understand their values, their non-negotiables, their strengths, what they naturally do well, we do purpose work, we do visioning work, we do all of that in the beginning and what might come out for them is that they identify passions and find career clarity.

I had someone who wanted to do financial education with elementary school children, that was her passion, but for financial reasons it wasn't something that she could pursue in the immediate future, but it was something that she was able to say “you know what, I have an idea of what I might do 10 years down the line”.

What we identified was that a lot of what was making her unhappy were things in the environment that she was in, so she made the decision to look for a different environment, not a different career. She was able to gain clarity around what made the most sense for her at this particular stage and then, have an idea of where she wanted to go as she got into a place where she had more financial independence to make different decisions. In my mind that is success.

I had another client who is an executive at a healthcare organization, and she thought she wanted to just make a tweak to her role and she ended up becoming a consultant in the Cannabis industry and starting her own business. So, you never know where these paths are going to go, it often doesn't look like what clients present with in the beginning and that's just because they haven't had the resources, time and support to help them really identify where they're at and what would best support them at the particular phase of life they're in.

**Jim Grace**

Yeah, that makes so much sense and I want to go back to you mentioning purpose and vision planning. We throw these terms, purpose and meaning and vision for the future, around a lot.

Can you give us a little bit of an example of a coaching framework and really boil that down into more practical ways to guide people through those really big, sometimes abstract, heavy feeling terms. Do you have any quick examples of what does purpose and vision planning look like with a client, what things that you're focused on?

**Kim Jones**

What we do in the purpose envisioning is we work with a couple of frameworks. One is Ikegai, which Japanese use to identify how you find meaning and purpose in life and it sits at the intersection of what you're good, at what you're passionate about, what you can make money doing, and what the world needs. We explore each of those parameters for a client.

In the “ what you're good at” realm we look closely at their strengths, I use Clifton strengths as an assessment to help people identify what they innately do well.

A lot of people spend time developing areas that they're not innately good at, and that often results in them not feeling competent or excited about work that they do in that area, so we explore if the person is someone who's analytical, or are they relationship oriented, or are they someone who's very comfortable being in charge or are they little bit more reserved and problem solving oriented.

We look at all of those things to fill out that “what are you good at” bubble of the Ikegai exercise and then we look at the other factors and then we look at how big are the gaps.

We identify, plan, and assess career and life goals between them and what kinds of jobs might sit at the intersection for the vision work. It's a simple exercise where people are describing what they want their life to look and feel like in one to three years and that is independent of their job, so it's about what problems are they solving, what do their relationships look like, where are they living, what kinds of activities are they doing around work and then we get more granular so that we fit career into the context of a bigger life framework.

That's really important, so we do those separate things within the Ikegai framework and then once we have the vision, strengths, values, non-negotiables, etc. - then I feed all of that information into ChatGPT and ask it to identify between 10 and 20 jobs that this person might be interested in doing and that is the starting point of the conversation around what are some options for them to explore.

We look at each thing and I have the client provide an assessment of how this feels on a scale of 1 to 10. If something feels like an 8, here would be my next step to explore it further, if one feels like a 2, then we're not going to do any more work on it and what we end up with is a handful of career possibilities that they then explore a little bit more to see if they want to pursue any of them and then once they have an idea of what's next, then we go into the typical stuff like resume, LinkedIn and job search.

**Jim Grace**

That's a great description and I'm glad we dug into those details because to me that really represents a really practical example of the support that you mentioned that coaching provides.

In a prior episode we introduced Ikegai as a really interesting framework to start thinking about purpose and meaning and that's just one example that you walked us through, that you use with clients.

That's where coaches and advisers and support people really can help clients get to the next level because, I think, a lot of folks intuitively have these feelings that they're not in the right place, they just don't have the tools and support to bring them through the process, to get to the other side and find these options.

That's a great use of the technology and AI to sort that down and have the results. Have you been happy since you started using ChatGPT with what the output comes back at?

**Kim Jones**

It it's incredible, actually. I was coaching before ChatGPT was even around and we were hunting and pecking on Google to try to find things, and this has made everything so much more streamlined and broad like we come up with.

There are so many options that I would never come up with or that we would never come up with and what's so interesting about it is that I'll generate the list between sessions, I'll take everything and I'll have it ready to go for a session and I'll look at some of the things on it and think like “there's no way that my client is going to be interested in that” and I've been surprised at how many times they've come back and they're like “wow that sounds perfect for me” and so I actually think the AI is smarter than I am.

Really scary, it's scary smart in terms of figuring out and providing options that wouldn't have been possible or have come up otherwise, and what's often so interesting about that phase of it is that's really where you start to get people to get very accurate and clear about how many risks they're willing to take to make the thing that they want to do happen.

This is where it really becomes that “you know what, I would really love to do XYZ career that sounds awesome to me, but I'm not willing to go back and get another degree or to start over again with a minimal salary or to risk that I'm going to start a business and it could fail” and so then we start really getting into limiting beliefs like “okay, are these limiting beliefs or obstacles something that we can overcome or are they a statement of what's most important to you that, at this point in your life, you don't want to look at”?

**Jim Grace**

So you get into some mindset work and think about what's in front of them… very interesting!

**Kim Jones**

Yes, so the mindset piece and overcoming limiting beliefs is crucial for success. For me, one of my biggest blocks was, I was really limiting myself, which is why it took me a couple of years to decide on a profession.

I was limiting myself in terms of “well it's got to be something that is impressive and looks good on paper and is prestigious” and the work that I wanted to do was in a realm that is prestigious and I think is incredibly valuable, but also has low barrier to entry, so anyone can call themselves a coach, and in my mind I was like “well that doesn't fit within my definition”, that was a limiting belief and once I was able to overcome that and say “you know what, my sense of fulfillment and being able to contribute to the world in the way that I want to, through the work that I do, is more important than this construct of what valuable work looks like”. So that's often work that we have to start doing, as we go through the process.

**Jim Grace**

Yes, it's really interesting to hear you describe that and I'm thinking about, in your case, you started your own business, right, so if somebody's willing to take the risk and start their own business, they have a little bit more control.

Are you finding people who might have a limiting belief that changing careers at a certain point in their working life just isn't going to work? They're not going to be attractive to employers if they are changing lanes. It can be challenging from the employer hiring standpoint.

How do you help people shift in terms of their direction and remaining hirable and all those things that I imagine may come up a lot?

**Kim Jones**

Bias in recruitment excludes nontraditional candidates unfairly, this is an area that I often deal with.

If I had a magic wand and I could change how the recruitment process works and the biases that drive recruitment, I would start there.

There's so much bias in recruiting, that says a strong candidate looks like a certain person, has certain qualifications and has a traditional resume, as I call it. They have X number of years of experience, an X level of education, these particular qualifications and what that does is it excludes non-traditional candidates from even being looked at.

It's a very exclusionary process, and what we use to say about a person being a good employee. If you look at research from Accenture and other organizations, it is not actually attributable in many cases to top job performance.

In other words, employers are looking for the wrong things, they're using the wrong proxies to identify who is a strong candidate. Often those candidates, that have been doing the job for 10 or 15 years, might no longer have a passion for it. They come in at top dollar, highly competitive coming in and not performing the same way someone who's passionate and interested in choosing the career with certain skill sets is going to be able to perform.

**Jim Grace**

That's kind of a funny point, they set themselves up to get the job changer who's on a search for something more meaningful. People with 25 year career, who think that maybe this time I'll feel more fulfilled, those are the people that they're potentially screening for based on their criteria.

**Kim Jones**

Absolutely, and we know, for example, that a lot of companies haven't really sat down to think through what are the skills that are actually needed to do this job well. Often, what falls out of that, are the very things that they screen for. Having a very detailed technical background in a particular area, they may over index on that and under index on someone who is collaborative, problem solving, resilient, able to work well with others, learn on the job, be adaptive and flex all the things that you need in the 21st century to work well. It is not what employers are generally screening for.

They bring in someone with technical competence who can't do these other things, they end up not working out as well as somebody who has intentionally set out to do a certain career. That connotes someone who is extremely motivated, highly invested in themselves, willing to take risks and believes in what their capabilities are.

Those candidates are the ones that I see, that are often overlooked. The way we work around that is through building the networks around the recruitment processes. We look at what skills they have, what strengths they have, where they want to go.

We write a resume that's more functionally oriented around the skills that they bring to the table, and then we do experience below, so it highlights things that the person is good at and why they're important for what you're looking for.

Then it's all about networking and building relationships with the employers and the hiring managers, that they want to be working for.

**Jim Grace**

Finding a way in the door and your resume to the top of the stack.

**Kim Jones**

Yes, and in doing that you have to be incredibly thick skinned and resilient, because of the ways that the recruitment processes are set up.

You're going to hear a lot of crickets and you're going to get a lot of doors closed on you, but what you're looking for is one or two people or companies that are going to take a look at what you have to offer and give you that chance, and that's where your career transformation happens.

Sometimes you have to go through 50 contacts to find that that one or two people. You have to be really resilient, to bounce back knowing that by going through those 50 you're going to find the one or two that are going to make the difference.

That's where mindset becomes so important in setting people up to know that this is a really difficult process and the systems are not going to work in your favor, but it absolutely is possible, you just have to keep at it and take the steps that works.

**Jim Grace**

Yes, this is a bit of a side note tangent, but are you starting to see that evolve at all? The recruiting process. Are you starting to see it get a little better and have companies recognize an opportunity to build culture and find the right candidate for the right job rather than screening for the standard technical background and education and all that are you seeing any movement there?

**Kim Jones**

We have ways to go, not enough movement. We still have ways to go.

When changing job market trends focus on skills we were in the early days of Covid, when we were in the great resignation and people were leaving their jobs at rates of 4 million a month and people were willing to walk away from jobs that were no longer fulfilling for them, companies, at that time, were more motivated to work with the candidates that they were seeing on the job market.

Now the job market has tightened up a bit, I'm seeing a lot of companies actually undo a lot of the things that they were doing well during Covid. We saw a lot of flexibility and remote work and working with people who wanted to be treated as a holistic worker, not just a unit of productivity.

All those things, that were trending in a certain direction, I am seeing now are being reversed in this current job market.

Companies tend to be reverting back to what they have always done and what they know rather than saying “hey, we've learned some things that can really help make us more effective employers going forward”.

Unfortunately, one of those is that companies tend to be looking again more scrutinizing, more for specific skill levels and technical experience, than soft skills, and I think that is going to continue to move because the data is there to support that if you are able to look for core skills, as opposed to technical experience, you're going to end up with a better result.

**Jim Grace**

It's interesting… well hopefully it continues to evolve in the right direction. Do you have any success stories? Was there anybody in particular that was really hesitant about these big changes and these big transitions and then got to the other side and said “why didn't I do this sooner”? I'm sure you hear that, but are there any that come to mind as particularly inspiring or worth sharing to folks?

I envision people listening to this might relate to it directly and say “gosh, I really should hire a coach” and I'm here to say that you should and hopefully you reach out to Kim, but I still think there's going to be a lot of people that just think “I just I can't do it right, I can't bring myself to make that change”. What happens on the other side? What are some of the results when people are in the right place, doing fulfilling work? Do you have anything that comes to mind that you'd want to share?

**Kim Jones**

So many examples! I mentioned the woman who made the change from being an executive at a health care company to running her own cannabis consulting business. She's killing it and doing fantastic work.

I have another client who was in the nonprofit sector, as executive director, doing work for a number of nonprofits, who wanted stay in that general lane and she wanted to do corporate social responsibility work, where she was going to work not on the nonprofit side, but for-profit in their philanthropy operations, helping them decide how they wanted to allocate funds. And as we were going through the process she was not motivated to really go out there and hit the ground pretty hard with that new line of work.

I encouraged her to take a step back and we've gotten very far in the process and I encouraged her to take a step back and rethink her options and within a week or two she came back and said that she wanted to pivot to help students navigate college. Help college and high school age students navigate the college application process. She realized this because she just helped her son go through his own process and she loved it and she realized how much work was required and she wanted to serve especially kids who didn't have access to resources to navigate those processes. She went back to school, got her degree and now she's running her own business and she's incredibly fulfilled doing that.

She had no idea that this was the direction that she was going to go, similar to the other client that I mentioned, who thought she wanted to just do a slight pivot in her career. These were two people who came through the process and went for it and said “you know, I'm going to go for the thing that I really want to do”.

And then, on the other end of the continuum, I had one client, a young woman with young kids who felt like she needed to be really grinding and working towards a promotion and so she was really interested in how she could bring a new skill level into a new job. In working with me she learned that a lot of her ideas, about what she thought she should be doing, were coming from her own social conditioning and internalized expectations of what she should be doing with her career. She realized instead career fulfillment and transition to entrepreneurship and that she actually really loved the job that she had and where she was at the level that she was and that her biggest priority was to spend more time with her kids. She took a step back in her career, rather than pushing the accelerator, and was incredibly fulfilled in doing that.

And then the last story I'll share with you is an email that I just got yesterday from a former client, who is a software engineer and decided that she wanted to go more into entrepreneurship, but she wasn't ready to pull the trigger at the time. She just sent me an email that she got into an executive education program overseas. She wanted to work overseas, and so she quit her job and she was going to be doing that in parallel with starting her own business.

So sometimes the work we do in the coaching is planting the seeds for a “down the line” change, but again, it's that clarity that they get going in that is so valuable for them to start making small steps and sometimes very big steps.

**Jim Grace**

Yes, but it sounds like taking the first step doesn't necessarily have to be hiring a coach, but I think a coach is a great resource to lay out the process and provide the support that so many people could really benefit from, because a lot of times, I think, the technical answers are there.

Chat GPT, if you prompt it, will give you a lot of information, but sometimes it's that human support that you provide as a coach, that is really the reason that people go from start to finish through the process and end up with that result.

So those examples are great, I appreciate you sharing. Is there anything else about your practice or process, for folks thinking about big changes in their career and finding purpose, that we left out that you'd want to share before I ask you a few last questions?

**Kim Jones**

One thing, I didn't mention in some of the examples that I gave, is that the people, who I work with, are able to achieve career fulfillment by just making a couple of tweaks in their existing environment.

Some of my clients identified that they would rather be doing work in this area and they realized that their company already offer that kind of work. Sometimes its just helping them get ready to have conversations with their managers about what they're interested in and helping to align their current careers more in the direction that they want to go.

That's some of the work that comes out of a coach, as well is really identifying options that maybe the client isn't even thinking about, like “can I make it work where I already am? Maybe I don't have to make a big drastic change.”

That would be the one thing I would add.

**Jim Grace**

I'm glad you shared that, because at the end of the day, there's no path to the same place for everybody. This is going to lead to a completely different destination, after you've done the work, than your neighbors and your colleagues and your friends. I'm glad that you shared that.

Last few questions.

This being a show about financial well-being, in general, maybe when you were going through your transition or maybe today, are there any practices or habits, things you do on a regular basis, that make you feel better, lower stress, help you feel motivated or focused?

What types of things do you go back to that you feel like improve your well-being?

**Kim Jones**

Yes, I have a morning routine, which changes all of the time, but right now looks something like 20 minutes of meditation, about 30 minutes of journaling and if I can swing it, a walk in the morning, and if I can't get around to it in the morning, I definitely try to do it after work.

And then, actually it's funny that you asked about this now, because right before our call I was noticing that my energy was particularly low and I used to just ignore that and push through and now what I do is I actually will say “okay what's going to help me raise my energy a little bit?”

Whether that's just getting outside and taking a quick walk and getting some fresh air, perhaps I will write down what is niggling in the back of my mind, that's bringing my energy down, maybe I'll reach out to a friend and say “hey I'm thinking about you, how are you doing”?

Just getting that like “oh my gosh it's so nice to hear back from you!” Those kinds of things can really be a quick energy boost, which I found to be so important in my life now to, first of all, showing up for my clients and serving, but also having general well-being and not just setting aside that, as it is a priority, because we're busy and we have things to attend to.

**Jim Grace**

That is interesting and brings up another question. Do you coach clients on some of those things, about making space? I envision a lot of folks, who are going through this, just don't feel like they have the time or the space or the energy to take it on. Do you find yourself having to coach some of this stuff, so that little self-care goes a long way when you're trying to tackle something like this?

**Kim Jones**

Absolutely, one of the things we do is find out where they're at with their energy level. A lot of people are not used to assessing energy level and prioritize self-care. Especially when they're thinking about their career not being the one that they want long term or they're in a really toxic or challenging work situation that they want to get out of.

What we first work on is what brings their energy up and how can we engage them in practices to get there. A lot of times I do hear that “My work is all consuming and then I've got a family and so I can't find time for those things” and then it really becomes the challenge that if you can't find time to engage in things that are going to help you build energy, that are going to be what sustains you through a career search, then how are you really thinking about moving forward, if there's no space in your life.

I had one client, who ended up quitting her job, because the energy was so low for her. It wasn't that she didn't have space, but she had no motivation, because she was struggling so much with her work environment.

It was interesting, this particular client, she spent a couple of months doing things that were really interesting and engaging for her, she was taking a cooking class and a tailoring class and exploring a perfumery line of work. She spent 3 months doing that, then she said “okay, now I'm ready to go back to what I was always doing, just for a different company, less toxic environment and I now have a better sense of what I want to spend my time doing on the weekends and as hobbies.”

Finding not work-related activities, that can sustain you outside of the careers that you want to have, is such an important part of the process and that is a very big part of the coaching that I do.

**Jim Grace**

That's cool! I've talked on the podcast about curiosity and creativity, and that finding purpose requires curiosity and creative exploration. When people have some other things outside of work and other passions, they seem to be very helpful and come up in the conversation of purpose and meaning a lot. These other things, that we have interests in, can go a long way to energize us, so I'm glad we touched on that before I let you go.

I appreciate you sharing your own practices of meditation and journaling. I think that's useful for all of us to consider.

One of the questions, that I ask everybody, are there any podcasts or books that you you'd recommend? Podcasts that you listen to, other people's work that you think is interesting?

If people wanted to pick some of this up and explore it a little bit further, what would you recommend?

**Kim Jones**

I love Adam Grant's work. He has a podcast, I think its called Rethinking Podcast, and there he brings up a lot of work topics that I think are absolutely relevant to the discussions that that we have had and then there's lots of podcasts that I like to consume, that are more on the personal development and mindset side of the equation.

I really like Brene Brown's work and then there's a podcast that is probably my favorite called “We can do hard things” with Glennon Doyle, Abby Wombach and Amanda Doyle and they spend a lot of time just talking about how you live a purposeful, intentional life by engaging in the things that are hard, that cause us to grow and develop to our fullest potential.

So those are some that come to the top of my mind.

**Jim Grace**

Those are three great recommendations and if people aren't aware on the podcast website, there's now a resources tab where we catalog all of these things. So those will be three great additions to the resource catalog.

Thank you for that, Kim, this has been great, I really appreciate your time!

I think that the work that you do can be really impactful for people, who are thinking about their career and purpose, and where they should be in life, the work that they should do etc.

We appreciate you taking the time!

Where do people find Kim Jones and the Kim Jones Alliance? Do you want to list websites or contact LinkedIn info, where should people check you out?

**Kim Jones**

The two places that I am most on is my website, which is www.KimJonesAlliance.com and you can find me on LinkedIn my handle is Kim Jones.

**Jim Grace**

Awesome, thank you again, it's always great to see you, I appreciate you sharing your story and your work with us and hopefully see you again soon!

**Kim Jones**

It was such a pleasure, I enjoyed the conversation, thanks for having me!

**Jim Grace**

Likewise, we'll see you soon.