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## You Are Your Best intervention: Utilizing Person-of-the-Therapist Training in Financial Therapy


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## You Are Your Best intervention: Utilizing Person-of-the-Therapist Training in Financial Therapy

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## **You Are Your Best Intervention: Utilizing Person-of-the-Therapist Training in Financial Therapy**

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*The field of financial therapy recognizes the importance of the therapist's self in facilitating effective client outcomes. Self-exploration involves a comprehensive exploration of the therapist's relationship with money, allowing them to leverage their experiences, financial flashpoints, and money scripts ethically and effectively. By engaging in self-exploration, financial therapists become role models for their clients, inspiring them to embark on their personal growth journeys. However, therapists must exercise caution to avoid projecting their beliefs onto clients. This paper explores how one specific program on the self-of-the-therapist exploration, the person-of-the-therapist model (POTT; Aponte, 1982), can be applied to financial therapy self-work. This approach to self-exploration highlights the significance of self-knowledge, awareness, and management in facilitating effective financial therapy. It emphasizes discovering one's signature theme (patterns, thoughts, or emotions that create challenges in functioning) and their role in shaping therapists' client interactions. Additionally, the use of one's own and their client's genogram can facilitate insights. This article introduces a hypothetical case illustration to demonstrate POTT's application to financial therapy. By embracing the POTT framework, financial therapists can enhance their self-awareness, manage their personal experiences, and optimize their therapeutic effectiveness, thus contributing to clients' financial well-being and personal growth potential.*

*Keywords: financial therapy; the person-of-the-therapist; self-exploration; signature themes; genograms*

## Person of the Therapist Training

The Financial Therapy Association educational series (FTA, n.d.) defined the concept of the self-of-the-financial therapist as a comprehensive exploration of an individual's personal relationship with money and how that impacts a financial therapist's work with their clients (McCoy, n.d.). However, as a term and concept, self-of-the-financial therapist is very much rooted in notions from the therapy world. There is a significant body of literature that explores the self of the therapist's work stemming back to Sigmund Freud who explored the concepts of transference (clients' unconscious feelings being projected onto a therapist) and countertransference (the therapist projecting those feelings onto the client; Hayes et al., 2015). Freud came to believe that the processing of avoiding transference and countertransference was essential for therapists doing harm in practice. He took it to the extremes of trying to make the therapist a blank slate for the client to avoid transference or countertransference from occurring.

Virginia Satir furthered this work and coined the term self-of-the-therapist (Satir et al., 1991). She focused on aiding therapists to become more congruent people by dealing with unfinished business from the past and focusing on our own health and self-care. Congruence is conceptualized as a state of awareness, openness, and connection in three human dimensions: intrapsychic, interpersonal, and universal-spiritual. The intrapsychic is a connection within the person, interpersonal is the connection between persons, and the universal spiritual is a connection with a universal and transcendent dimension. By heightening their awareness in these dimensions, therapists can better prepare and center themselves before sessions. This practice enables therapists to be emotionally available to connect deeply with their clients' inner worlds.

Harry Aponte (1982) expanded the work of Satir and Freud by focusing on what he called the person-of-the-therapist (POTT). Aponte emphasized that our past experiences could aid the therapeutic process. If therapy practitioners can do introspective work to focus on past negative experiences, they can *help* the therapeutic process. This came in opposition to the earlier views of Freud and Satir who wanted to remove the self of the therapist from the therapy room. Instead, Aponte believed that humanity was a tool that could be honed. When therapists can work through their own past emotional and psychological pain, they can better relate, understand, and access the personal struggles of their clients. In other words, therapists can more fully empathize with their clients.

Significant research in this area shows the value of self-exploration for practitioners. First, research consistently indicates that the practitioner's role is critical to the therapeutic process. Studies suggest that approximately 30% of the change observed in therapy can be attributed to the practitioner and their relationship with the client (Asay & Lambert, 1999; Sprenkle et al., 2013). While no specific evidence exists regarding financial therapists, it is reasonable to assume that a similar dynamic applies to them. Therefore, financial therapists who engage in self-exploration leverage their experiences, financial flashpoints, and money scripts to work with their clients ethically and effectively. Through self-exploration, financial therapists are role models for their clients to embark on this type of personal work, demonstrating the importance and the process of personal growth. Sharing stories of overcoming personal struggles can be particularly impactful, allowing clients to connect with their clients on a deeper level (Klontz et al., 2010).

Next, the self-exploration process cultivates empathy within financial therapists. It enables them to understand and relate to the challenges and difficulties faced by their clients, fostering a more empathetic therapeutic environment. However, acknowledgment of the possible negative orientation during this process is essential to financial therapists who must be cautious of countertransference and not project their own beliefs, attitudes, or experiences onto their clients, as this could hinder the client's ability to address their needs (Hayes et al., 2015; Klontz, et al., 2010). This may prevent the client from doing the work they need to do themselves. Attending to the emotional, psychological, behavioral, relational, and financial is a gift to you (McCoy et al., 2013).

The FTA has outlined several key components to provide a deeper understanding of the self in financial therapy. First, financial therapists must recognize transforming, self-limiting beliefs, and detrimental money beliefs and behaviors by exploring their own financial history and reflecting on experiences influencing their approach to money. Financial therapists are urged to delve into underlying causes of financial concerns, shame, money secrets, and fears of financial freedom. Next, FTA emphasizes the importance of exploring the influence of race, culture, spirituality, gender, and personal values on one's own financial perspective. Finally, financial therapists should be financially sound themselves, embodying the principles they teach clients (McCoy, n.d.).

This paper will describe one such approach to self-introspection called the person-of-the-therapist (POTT) framework for self-work (Aponte & Kissil, 2014). This approach contrasts with the traditional perspectives of self-work in psychology, which in the past emphasized removing all traces of the therapist's humanity with the goal of becoming a blank slate for their clients (Logan et al., 2021). Instead, POTT training encourages therapists to employ their own experiences consciously and strategically by exploring what are known as signature themes (Aponte, 1982). POTT work focuses on intentionally utilizing the practitioners' own self as a valuable resource in the therapy process. This paper will introduce the steps of the POTT model (e.g., signature theme, genogram development, client reflection). Still, the hope is that engaging in personal introspection may inspire financial therapists to pursue comprehensive training in the POTT approach (Aponte & Kissil, 2014). To illustrate the POTT experience, a hypothetical case study is incorporated at the end of the paper based on an amalgam of the authors' experiences with their own self-exploration and their clients.

### **The Person-Of-The-Therapist (POTT) Approach**

To embark on the path of the person-of-the-therapist (POTT; Aponte, 1982), the practitioners' self-knowledge is needed, encompassing an understanding of one's history, worldview, morals, values, and social context. These elements collectively shape the therapist's perception of their client(s), the issues they present, and the underlying theories of change that guide the therapeutic process (Aponte & Kissil, 2014). Practitioners must be able to access this self-knowledge and maintain a heightened awareness of their internal state during therapy. By remaining attuned to their own emotions, thoughts, and reactions, therapists can effectively utilize their personal insights to inform their therapeutic interventions (Aponte & Kissil, 2014). Effective management of the therapist's self is

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paramount. This involves the skill and discipline to selectively incorporate aspects of their own self into the therapeutic context. By consciously utilizing themselves, therapists can enhance their understanding, connection, and therapeutic impact, while ensuring appropriate boundaries and avoiding undue personal influence (Aponte & Kissil, 2014). In essence, Aponte (1982) developed the POTT approach to help practitioners realize that “we are ‘wounded healers’, and it is how we therapists use those wounds that make the difference beyond technique in the human experience called therapy” (Aponte & Kissil, 2014, p. 152).

The POTT (1982) process has three key phases. First, the practitioner will complete exercises to discover their signature theme - the core psychological issue that shaped us. Then they will explore how that signature theme plays out in their relationship dynamics through the use of the practitioner’s examination of their own family genogram. The final stage will be to reflect on the client that they have the strongest emotional reactions to - whether positive or negative emotions - through examining similarities and differences between their personal genogram and their clients’ genogram. The goal of this process is to help practitioners engage in their humanness and their own personal journey in sessions with clients intentionally, rather than reactively and based on unconscious emotions.

### **Signature Theme Development**

At the core of the POTT approach lies the concept of a signature theme (Aponte, 1982). Aponte describes signature themes as “the personal issue that has been most dominant in your life. This is the hang-up of yours that has vexed and continues to vex you, affecting many or all areas of your life” (Kissil et al., 2014, p. 4). It recognizes that all therapists possess some form of personal woundedness that has influenced their lives and interactions with others. By identifying and comprehending their signature theme, therapists can better access and manage it, enabling them to maintain appropriate distance and objectivity. For example, Aponte and Kissil (2014) identified several themes commonly experienced by first-year therapists, including difficulties in staying connected to their emotions and being vulnerable, a tendency to anticipate adverse outcomes and struggle to enjoy positive experiences, fear of loneliness or abandonment, worries about being unlovable, and concerns about losing their parents.

An illustrative example of how signature themes can manifest in one's behavior is seen in individuals who tirelessly protect and fix others, often at the expense of their own well-being. By identifying this signature theme, individuals become aware of how they may excessively manage their partners, children, or even clients, inadvertently preventing them from developing their own capabilities. Reflecting on these elevated levels of signature themes reveals fears of vulnerability, imperfection, abandonment, and the need for control. In addition, it prompts individuals to consider significant fears that shape their interactions with others and their reluctance to disclose certain aspects of themselves (Aponte & Kissil, 2014). The four most commonly stated were fear of rejection, fear of vulnerability, feelings of a lack of self-esteem or worth, and a need for control (Aponte & Kissil, 2014).

In the process of exploring the person-of-the-therapist, it is common to uncover one signature theme, only to realize that deeper layers underlie it. For instance, an initial

exploration may reveal a person's inclination to please others stems from a fear of inadequacy. This realization prompts individuals to delve further into their experiences and fears, allowing for a more comprehensive understanding of their underlying motivations and anxieties (Aponte & Kissil, 2014). It can be hard to unpack these layers on your own, so it is often more beneficial to seek out a POTT training opportunity, or at the very least, a supervisor or therapist to help you work through your hypothesized signature theme. This will provide you with both emotional support and challenge you to examine difficult subjects in more depth than you could on your own.

Aponte and Kissil (2014) created specific questions to help elicit signature themes. The questions are designed to probe into various aspects of an individual's fears, self-perception, hidden aspects of their identity, limitations in functioning and relationships, stress management strategies, and recurring patterns that have proven detrimental in their life. For example, they have their participants reflect on their biggest fear in life (e.g., being abandoned, feeling stupid) or reflect on a trait that they have that restricts their ability to function in relationships (e.g., not being able to trust others for support, shutting down when upset) and reflect on their earliest memories of those fears and traits. They encouraged students to reflect on what patterns of feelings or thoughts they have had throughout their lives that have influenced the way they relate to others. Signature themes are not about specific events or past relationships, but rather developed at a young age and persisted throughout life. The various aspects of one's life, such as family relationships, personal relationships, ethnicity and race, culture, spirituality, socioeconomic circumstances, and so forth, all contribute to the development of one's signature theme (Aponte & Kissil, 2014).

### **Personal Genogram Reflection**

The second component of the POTT (1982) approach is the encouragement of the practitioner to create and explore their genograms. Genograms are visual depictions of a family tree that is used to assist in understanding complex family dynamics, intergenerational patterns, and the impact of financial factors on individual and familial well-being (Weeks & Fife, 2014). By utilizing genograms, individuals can explore their financial history, relationships, and behavioral patterns, providing valuable insights for self-reflection and therapeutic work. Traditionally, genograms are developed for clients, functioning both as an assessment tool and as an intervention tool. As an assessment tool, genograms assist therapists in evaluating the dynamics within a family, aiding in comprehending individuals' stories and experiences. Additionally, genograms can be used as an intervention tool to help clients gain insight into their narratives. An essential benefit of utilizing genograms to process personal stories is their ability to facilitate a shift from being emotionally overwhelmed to a more cognitive processing of financial dynamics. Creating a genogram enables individuals to observe and analyze their financial dynamics from a detached standpoint, allowing them to fill gaps in knowledge about their family history.

Utilizing genogram work in clinical therapy training programs has been found to be a beneficial experience for therapists as it allows them to: (a) develop the skills of creating the genogram for future clients, (b) understand the experience of being in the client's seat in genogram development and examination, and (c) truly develop insights into their relational

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dynamics in their family of origin (Lim, 2008). In the POTT process, the therapist creates their own genogram as a way to gain insights and self-awareness into how their own family history may influence their thoughts, feelings, and behaviors inside and outside of client sessions. Furthermore, the POTT process provides an opportunity to reflect on how our signature themes were developed and maintained through our relationship dynamics (Aponte & Kissil, 2014). Reflecting on one's genogram can be a therapeutic process for the therapist aiding them in their own self-awareness and authenticity to use their past experiences more effectively. All genogram work can be beneficial for financial therapists interested in examining how their lived experiences may be showing up in their personal and professional relationships.

This genogram exploration process in the POTT curriculum can be expanded to construct a money genogram that can examine how relationship dynamics are often intertwined with money dynamics, shaping the overall family dynamics (Aponte, 1982). By examining their money genograms, therapists can further understand and make sense of their financial experiences and their impact on their signature themes. Derived from the traditional genogram concept, money genograms extend beyond familial connections to depict a comprehensive representation of an individual's financial history, behaviors, and relationships (Archuleta & Burr, 2015; Gallo, 2001; Mumford & Weeks, 2003). Money genograms are valuable as often money is not talked about in families (McCoy et al., 2019; White et al., 2021) which can lead people to project other's motivations and lead to misunderstandings (Mumford & Weeks, 2003).

The money genogram designed to be a focused genogram can explore the meaning of money or the norms and values they learned from purposeful socialization as well as observation in their family of origin (Gudmunson & Danes, 2011; Mumford & Weeks, 2003). It also can examine how money was acquired, used, and managed as well as the money personalities of individual family members (Gallo, 2003). Regardless, this holistic approach encompasses not only monetary transactions and assets but also intricate dynamics, such as spending patterns, earning power, investments, debts, and even attitudes toward money that have been passed down through generations. Key components encompass financial milestones, career trajectories, significant life events, inheritances, and any relevant financial knowledge or education that has been transmitted across family lines. To learn more about how to start one's money genogram, we highly recommend reading the questions developed by Mumford and Weeks (2003) that serve as wonderful prompts for money genogram development. Some examples from Mumford and Weeks (2003) are found on pages 39 - 40 include:

- Who has control over the money in your relationship?
- What was your mother's role concerning finances?
- As a child, did you think you were rich, poor, or middle class?

The inherent value of money genograms lies in their capacity to unveil hidden patterns and behavioral insights and facilitate the use of financial conversations that may help uncover some of our unsaid family values or even some mistaken projects that are incorrect but never spoken (Mumford & Weeks, 2003).



## Genogram and Signature Theme Influence in Client Work

Exploring how a therapist's signature theme influences their work is vital to recognizing countertransference. Countertransference refers to when a therapist has an emotional reaction to their clients which is often triggered by one's signature theme and unresolved past issues. As part of the POTT training, the next step is to identify which clients elicit a powerful reaction in the therapist. In other words, which clients are creating countertransference (Hayes et al., 2015).

Countertransference can manifest in numerous ways (Cuseglio, 2019). Some of the most common are overidentification when a therapist may feel an excessive emotional connection to a client which can lead to biased judgment or overinvolvement with a client. Another way is projection when a therapist attributes their own feelings, thoughts, or attitudes to their client and is no longer able to "hear" their client clearly. Finally, countertransference can manifest strong either positive (e.g., love, desire to save, desire to care for) or negative (e.g., hatred, dislike, annoyance, desire to avoid) feelings that cloud their ability to provide quality care to their clients.

To explore countertransference, the next step of the POTT approach (Aponte, 1982) is to examine the client's genogram to identify what is triggering the therapist's emotional reactions. Aponte and Carlsen (2009) provide a guide on how to work through this assessment. They ask the therapist to address the following:

1. Recognize cultural or spiritual overlaps or differences between their own genogram and their clients.
2. Reflect upon what the client is presenting and if there were times in their own life when they were dealing with a similar issue.
3. Discover what obstacles they are experiencing that may be preventing them from truly using their lived experiences to help their clients.
4. Identify what the therapist can bring in from their own life that may aid the client in overcoming their presenting problem.

Again, what sets the POTT approach (Aponte, 1982) apart from other self work is that the goal of POTT is not to remove your lived experiences but to use them to foster change.

### Case Study

To illustrate the POTT experience, a hypothetical case study was developed based on one of the author's lived experiences but has been modified and fictionalized to protect confidentiality and anonymity for the author and people in the author's life. Edits and changes were developed based on the amalgam of experiences by all the authors of this paper to also emphasize the POTT approach (Aponte, 1982) better. For the sake of confidentiality, this article will refer to the therapist as Mary. Her clients are a heterosexual married couple named Sara and Mark. The following is an exercise that any therapist can work through to help them be cognizant of how their own life experiences impact their work with clients. This example shows how Mary worked with a client who brought up emotions

connected with her own experiences that connected with her signature theme and how she processed those feelings.

### **Signature Theme Development**

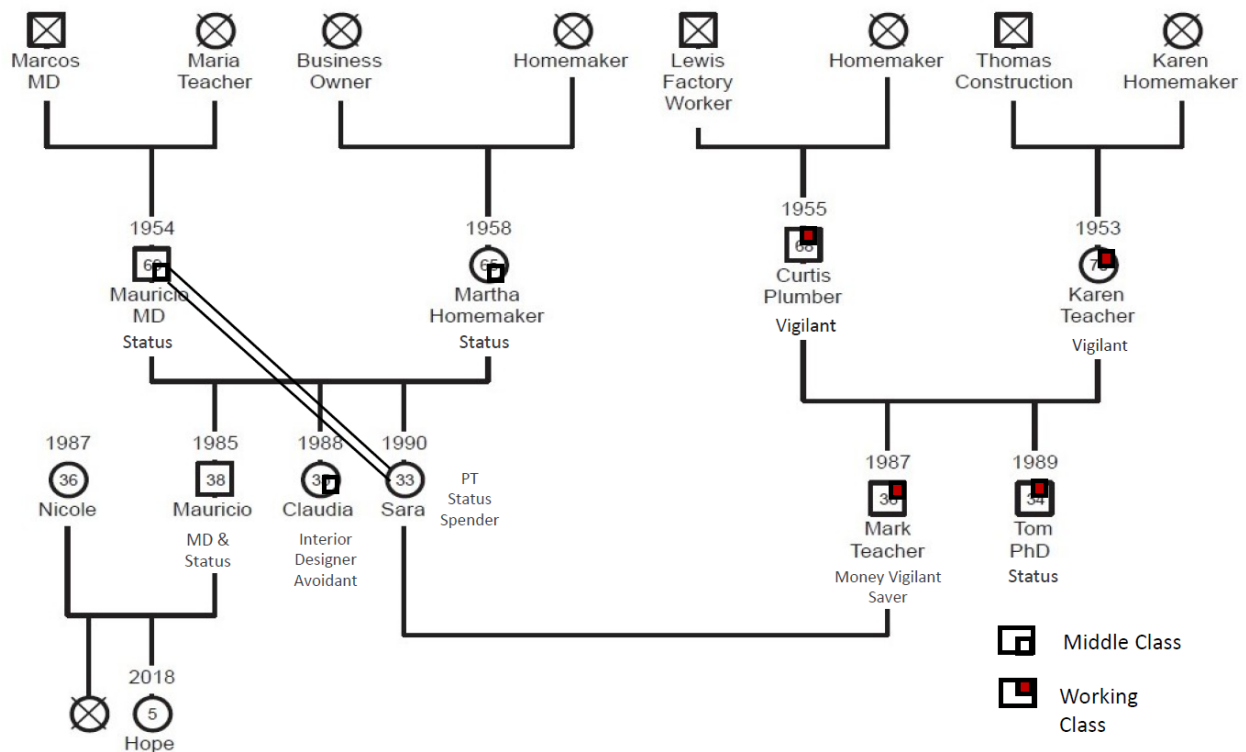
Signature theme development often plays out through being able to address specific questions about our family dynamics. Questions focused on how we showed love and support, how we dealt with conflict, how we expressed emotion and how our loved ones reacted to our displays of emotions. As aforementioned, Aponte and Kissil (2014) created a wonderful list of questions that can help elicit signature themes. The questions serve as a starting point to delve deeper into family dynamics and recurring themes. This process allowed Mary (the therapist in our hypothetical case study) to begin to recognize that her signature theme revolves around her need to take care of others. She often finds herself overworking and taking on more than expected to ensure that the outcome will be what she expects. It is hard for Mary to allow others to help because of her fear of failure. The topic is embedded in Mary's need to feel secure and have stability in all aspects of life. Then in a marked effort to examine her signature theme in the life of her financial behaviors, values, attitudes, and beliefs Mary reflected on how this theme related to the way she views money and finances. It is important for Mary to be self-sufficient and to have financial stability so that she can care for others, caring for others being at the core of her signature theme. Not being able to financially support her family would symbolize to her that she had failed them and therefore they may not need her anymore. Throughout the POTT process (signature theme development, personal genogram reflection, and client work examination), the signature theme may evolve, shift, or grow and that is a by-product of further self-exploration (Aponte, 1982).

### **Personal Genogram Reflection**

In Figure 1 we provide insights into Mary's (our financial therapist) money genogram. The genogram (developed in Genopro.com) revealed that both of her parents hailed from a working-class background and her father eventually owned his own business. Notably, they maintained separate finances, with the father engaging in financial infidelity toward the mother. One major secret her father did not share with her mother is that he took out a loan to help maintain the business. In order to receive more loan money, he used the mom's name without fully disclosing why he brought papers home for her to sign.

This dynamic was rooted in a patriarchal worldview, where the father assumed the role of breadwinner and exercised control over the family's finances. Moreover, the mother received an allowance from the father, emphasizing Mary's theme of self-reliance and a reluctance to depend on others for financial security. Finally, it is worth mentioning that Mary's grandmother, who resides in the same household, has a positive influence on financial matters. As a single mother of six, the grandmother strongly emphasized saving money and working hard.

## Client's Genogram



During Mary's teenage years, her family faced financial struggles as her father lost his job and business, exacerbating the challenging circumstances. This experience further reinforced Mary's conviction to take charge of her own well-being and extricate herself from such situations. Consequently, Mary moved to the United States, aspiring for greater financial independence. Her core belief centered on the importance of money, self-care, and self-reliance, cultivating an enduring sense of vigilance. Despite experiencing gradual improvements in her financial situation over time, Mary never truly feels at ease or relinquishes her vigilant approach to managing money. This illustrates how past financial experiences can profoundly influence one's perceptions and management of money, regardless of their level of financial comfort.

The genogram analysis and the exploration of Mary's signature theme elucidate the intricate interplay between family dynamics, financial experiences, and personal beliefs regarding money. By examining the genogram and delving into Mary's unique financial narrative, the therapist gains valuable insights into her relationship with money and how it shapes her financial habits and attitudes. Mary's sense of security and feeling taken care of by her grandmother played a significant role in her upbringing. While her grandmother provided comfort, Mary also needed personal control. Her decision to come to the United States independently served as a validating experience, reinforcing her belief that she could secure employment, pursue education, and improve her circumstances. This positive encounter aligned with her signature theme of vigilance, strengthening her conviction that

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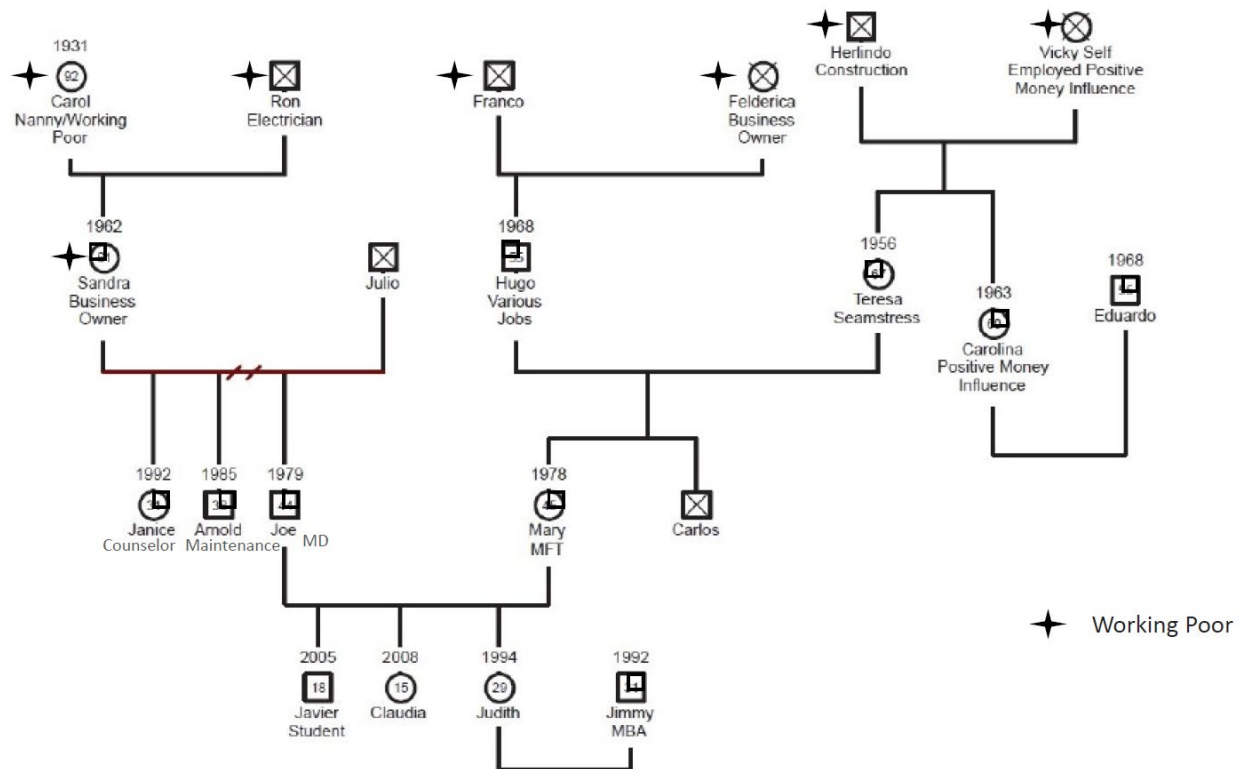
as long as she maintained self-sufficiency and stayed proactive, favorable outcomes would ensue. However, a shift in Mary's perspective gradually transpired during her graduate school years. She began to recognize that there were individuals she could rely on for support rather than shouldering everything independently. Notably, her husband became a crucial source of support in challenging her ingrained vigilant mindset. Over time, Mary has learned to loosen her grip and delegate certain responsibilities to her husband, realizing that she can achieve her goals even in his absence.

Mary's heightened self-awareness has facilitated personal growth and enhanced her capacity to empathize with clients, leveraging her own background to provide a balanced perspective without imposing her views. This awareness empowers Mary to be cautious of over-identifying with clients and sharing her own experiences excessively during therapy sessions. Recognizing the potential for one's good intentions to hinder the client's progress, Mary consistently engages in self-reflection to ensure she remains focused on facilitating the client's independent process rather than directing them according to her preferences. However, no practitioner is perfect at all times.

### **Client's Genogram Exploration**

Recently, Mary recognized that her signature theme was starting to be initiated during sessions with a specific couple with which she was working. Mary's clients are named Sara and Mark who presented with communication problems. However, in sessions, it appears that many of the problems are caused by the differences in their financial perspectives. Despite having a high income, the couple was fighting over spending patterns so much that they had gotten to the point of considering separation. Mary felt herself swaying to extremes with the couple. In some sessions, she felt incredibly protective of Sara to the point of alienating or blaming Mark. Other times, she felt annoyed at Sara's irresponsibility and sided too strongly with Mark. In essence, Mary was experiencing countertransference in an overidentification of Sara that led her to start projecting her own experiences on Sara, feeling strong positive feelings of wanting to protect Sara, as well as strong negative feelings for Mark that made her angry at him or at the very least decreased her focus on his needs in the therapy room. Mary viewed Mark as an appendage to her client, Sara, rather than seeing the coupleship as the client (Smith-Acuña, 2010). At that point, she knew it was time to be proactive and examine what similarities and differences she could spot in her genogram and her clients' genogram.

## Therapist's Genogram



As one can see in Figure 2 of the couple's genogram, Sara is a 33-year-old female of Hispanic background with a Doctorate in Physical Therapy. She is the youngest of three children. She grew up in a traditional Hispanic family where the father was the breadwinner and the mother stayed at home caring for the children. The family identifies as Catholic but loosely follows Catholic traditions. Sarah self-described her family as upper-middle class. Sara's father is a physician who immigrated from Mexico. Her parents have been married for 39 years. All of Sara's siblings have a graduate degree. After graduating with her doctorate, Sara joined a physical therapy group practice where she is an associate on track to become a partner.

Mark is a 36-year-old elementary school teacher. Mark's family is of Irish background. His great-grandparents emigrated from Ireland and settled in the Suburbs of Philadelphia. His family of origin adhered more to Catholic traditions. Until a year ago, Mark was employed as a full-time teacher for the local school district. He is now self-employed in a business that he co-owns with Sara. Mark is the youngest of two children. Mark's father is a plumber; he owns a very lucrative plumbing business. Mark's mother is a schoolteacher. They have been married for 44 years. Both Mark and his brother have graduate degrees. The client self-described as growing up in a working-class family.

Mark described his family as moving from a working class to a middle-class family that achieves their status with hard work and frugality. Mark describes his family as "self-made." Throughout his life, Mark has learned to be careful with money and to live below his

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means. Sarah, on the other hand, was never educated about money. Being a woman in her household meant that she was conditioned not to worry about money because it was the husband's job to take care of finances. In college, Sara's family expected her to study and do well in school, but her primary focus should be to become a wife.

Sara's upbringing and the lack of emphasis on finances resonated with the way Mary was raised. Her father was in many ways like Sara's father, triggering feelings of unfairness now as an adult. Mary noticed the discrepancy between her own knowledge of finances and other adults her age. Both Sara and Mary were deprived of the knowledge of how to handle money, the freedom that comes with overseeing your finances, and the importance of understanding the meaning of money in our lives.

Mark and Sara struggled with communication and became less understanding of each other. Little issues like chores become fights. They both agreed that they loved each other, trusted each other, and wanted to be together. They came to therapy looking to learn better ways to express anger with each other.

The second issue that came up was the desire for Sara to upgrade their lifestyle. They were happily living on a modest income. However, Sara believed they deserved to have better possessions (e.g., bigger houses, better vehicles, "guilt-free spending"), in addition to traveling more often. Mark, however, saw no problem with the kind of life they had. He agreed that he would like to do more traveling but disagreed with the "unnecessary changes in lifestyle." The disconnect in lifestyle needs is creating a bigger gap between the couple.

The third problem that came up was the overall disagreement in finances. Mark and Sara wanted to be able to plan how to use their money in the short term and how to effectively plan for the future. Their family background and money appeared to affect the way they communicated about money.

### **Exploring Therapist's Genogram and Signature Theme Influence in Client Work**

Mary began to realize the patterns that were triggering an emotional response in her. Mary realized her ethnic and cultural background was similar to Sara's background. Sara's father, like Mary's (and many men in the Hispanic community), was the breadwinner in the household. The women stayed home to care for the children and do the household chores. The setup, in most cases, leads to the man controlling the finances in the household. Mary realized that both she and Sarah had fathers who were providers and had full control of the household finances. Mary's family never discussed money, which led to a lack of knowledge in money management as a young adult. Mary and Sarah found themselves with the task of "figuring things out" as they became adults. Opposite to Sara, Mary had a couple of influential people in her family who guided her in the journey of learning how to manage money. Mary feels like Sara may be in an early stage of development where she is realizing the need to become financially educated but does not know where to start.

Mary felt a sense of injustice on behalf of Sara. She was deprived of financial information and the consequences are negatively influencing her marriage. This sense of

injustice created a strong sensation for Mary...a need to take care of Sara by “teaching her” the many things that Mary had to learn throughout the years. Mary began to feel protective over the client. Mary also had a negative reaction to the fact that Sara also had the opportunity to learn more about finances in her adult life but chose not to do so. These strong emotions were coupled with the fact that there were cultural values shared between Mary and Sara in that they were both Hispanic females from immigrant families. In addition, they both came from families where men were seen as more important than women. However, women were held at a much higher expectation level. The difference is that Sara grew up in a more privileged environment where her family did not struggle financially like Mary’s family. Mary wonders if the early struggle forced her to learn how to manage finances, whereas Sara did not have as much of a need to learn about money and the lack of financial knowledge is causing problems.

As Mary became aware of her emotional reaction to the situation, her POTT training allowed her to step back and reassess her role as a therapist. As a reminder, Mary’s signature theme is a strong need to care for others due to a fear of failure. In seeing her strong personal reaction to this case, she realized that the combination of her signature theme and her own family’s money gender role dynamics were coming up for her. She was able to recognize that the clients wanted a counselor, not a savior. She found ways to encourage Sara and Mark to lean on each other more to educate each other on sound financial management practices. Mary also helped Sara and Mark discover ways in which they could share responsibility in order to empower Sara while simultaneously aiding Mark in feeling less pressure to be the sole financial manager in the household. A shift happened in therapy as Mary became more aware of how her signature theme was playing into her work with clients, her hyperfocus on Sara lessened and she was able to address both partners in a more systemic way. Mary was able to see their dynamic through a respectful culturally aware lens, without imposing her own beliefs or expectations on the couple. In addition, as she became aware of her signature theme coming up in with her couples.

### **Conclusion**

Using self in a therapy session with the client is like having a second conversation with oneself. The therapist is not only observing the content and process aspects of the session, but also acknowledging one’s own emotions, reactivity, and presence and its impact on the client. The POTT approach poses an opportunity to navigate the impact of the therapist’s signature theme on their work with clients through several important steps (Aponte, 1982). First, the therapist should reflect on how their signature theme has influenced or may influence their client relationships, highlighting both positive and negative aspects. This introspective examination allows the therapist to gain insight into the personal meaning embedded within the client’s presenting issues, especially in relation to their own signature theme.

Additionally, the therapist should identify and address their challenges when working with clients, considering how their signature theme contributes to these challenges. This self-awareness enables the therapist to develop a plan for effectively managing these difficulties, drawing upon their own life experiences as a valuable resource. It is crucial to

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approach this process with empathy and understanding, recognizing that their financial status or social standing does not solely determine an individual's suffering.

The therapist must remain vigilant in recognizing when they may be over-identifying with clients or reaching a point where their own experiences overshadow the client's process. The person-of-the-therapist training (POTT) program plays a pivotal role in facilitating self-awareness and self-exploration, enabling therapists to balance their personal backgrounds and the therapeutic needs of their clients (Aponte, 1982). It is not uncommon to experience moments where one may feel that their personality or background overshadows the therapeutic process. Through this journey of self-discovery, therapists gain a deeper understanding of themselves and mitigate these tendencies by being attuned to sessions where they feel emotionally aroused or find themselves dominating the conversation with personal anecdotes. As Aponte and Kissil (2014) aptly express, “the fundamental essence of the POTT philosophy lies in acknowledging human vulnerability, which in turn paves the way for healing and personal development” (p. 106).



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