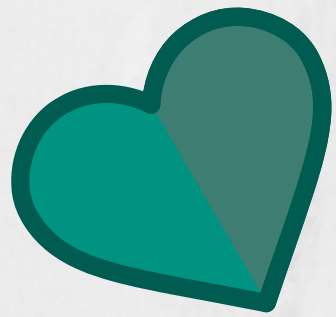


MANAGING MONEY



As A Couple



Work Sheet

Instructions: Fill out this worksheet separately. Come together at a scheduled time to discuss your answers.

Note: Do not discuss your answers with each other if you are in a hurry, upset, or distracted. Please allow yourselves time to have an open, full hearted discussion about these questions.

Question 1: How do you feel about having a money rule? (A money rule is an agreed upon amount of money you will discuss with each other before purchasing an item for that amount of money.)

Question 2: What amount do you think would be good if you decide to have a money rule? Why? (If you say \$20, you and your partner would agree to discuss items you want to purchase over \$20 BEFORE you purchase them.)

Question 3: How are you currently combining your finances?

Do you feel this method is working? Why or Why not?

Question 4: If your current method of combining finances isn't working, (or your newly coupled and have not combined finances yet) would you be willing to try a different method?

What Method would you consider and why?

Question 5: Are you bringing debt into the relationship? How do you think this debt should be handled? (do you want to work with your partner to manage or get rid of it?)

Is your partner bringing debt into the relationship? How do you want to manage it? (do you want to work with your partner to manage or get rid of it?)

Question 6: Do you have any bad money habits, or secrets that your partner isn't aware of? (Discuss anything you feel that you have been hiding from them financially, you will feel better!)

Question 7: What are your dreams for the future? (*Do you want to travel, have a house, have multiple houses etc.*)

Question 8: Where do you want to be financially in 5 years?

10 years?

20 Years?

Question 9: List 3 ways you can start working towards meeting your life goals immediately (*such as budgeting, making side or extra income, getting out of debt etc.*) **Pick things you can reasonably start doing:**

1.)

2.)

3.)

Question 10: What would you like your partner to help you with financially? How can they encourage you to stay on track?

Question 11: How can you work together and stay accountable so that you can meet your goals?

CONGRATULATIONS! You completed this worksheet! Hopefully understand each other and can start working to create your dream life together!

The Next step is to create an **Action Plan**. In the coming days or weeks, I encourage you to meet regularly to come up with a plan on how you are going to meet your goals!

If this worksheet was helpful let me know!

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