

# Money Date

**"A RELATIONSHIP WITHOUT COMMUNICATION IS JUST TWO PEOPLE."  
- UNKNOWN**

## **I CREATE A SPACE FOR YOUR MONEY DATE:**

- Schedule a time to get to know each other financially.
- Turn off your phones - not just airplane mode, but off.
- If you have kids, find someone to watch them.
- Make a meal or beverage to enjoy during your conversation.

## **II SPEND 15 MINUTES ALONE REFLECTING ON YOUR GOALS:**

- Start with your big-picture vision for the future. Reflect on what matters to you and write down what you want for you and your family.
- Next, ask yourself what steps you have to take in order to accomplish your vision. Write down these steps as individual goals.
  - To help you brainstorm, think of goals in each of these five categories: Live, Give, Owe-Debt, Owe-Taxes, and Grow.
- Finally, ask yourself what could prevent you from achieving each goal and write down potential risks.

## **III COME TOGETHER AND SEEK TO UNDERSTAND EACH OTHER'S VISION AND GOALS:**

- Ask each other questions 1-3 on your individual worksheets.
- Ask which goals are most important to your spouse and why.
- Listen without interrupting.

## **IV COMPROMISE AND PRIORITIZE BY EXPLORING THE FOLLOWING:**

- Brainstorm to see if you have any more joint goals in the Live, Give, Owe-Debt, Owe-Taxes, or Grow categories.
- Prioritize your goals together and write them on your Joint Worksheet.
- Clarify a purpose, timeframe, and cost for each goal.

## **V CALL TO ACTION:**

- Agree on one action item to propel your desire forward, agreeing on who will do it and when it will be done by.
- Schedule a meeting with your financial advisor to develop a strategy for accomplishing your goals.
- Schedule your next money date.

# Joint Worksheet

## OUR GOALS (PRIORITIZED):

1. Purpose: \_\_\_\_\_  
Timeframe: \_\_\_\_\_  
Cost: \_\_\_\_\_
2. Purpose: \_\_\_\_\_  
Timeframe: \_\_\_\_\_  
Cost: \_\_\_\_\_
3. Purpose: \_\_\_\_\_  
Timeframe: \_\_\_\_\_  
Cost: \_\_\_\_\_
4. Purpose: \_\_\_\_\_  
Timeframe: \_\_\_\_\_  
Cost: \_\_\_\_\_
5. Purpose: \_\_\_\_\_  
Timeframe: \_\_\_\_\_  
Cost: \_\_\_\_\_
6. Purpose: \_\_\_\_\_  
Timeframe: \_\_\_\_\_  
Cost: \_\_\_\_\_
7. Purpose: \_\_\_\_\_  
Timeframe: \_\_\_\_\_  
Cost: \_\_\_\_\_
8. Purpose: \_\_\_\_\_  
Timeframe: \_\_\_\_\_  
Cost: \_\_\_\_\_

## ACTION ITEMS:

1. Who: \_\_\_\_\_  
What: \_\_\_\_\_  
When: \_\_\_\_\_
2. Who: \_\_\_\_\_  
What: \_\_\_\_\_  
When: \_\_\_\_\_

# Individual Worksheet

1. What is your vision for the future?

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2. What financial goals could help you accomplish that vision?

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3. What financial risks could prevent you from meeting your goals?

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4. What is something you appreciate about your spouse?

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# Individual Worksheet

1. What is your vision for the future?

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2. What financial goals could help you accomplish that vision?

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3. What financial risks could prevent you from meeting your goals?

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4. What is something you appreciate about your spouse?

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