

## Goal Planning for Couples

**Names:**

**Date:**

1. Now that we've been working together and we've accomplished quite a bit, what are you looking to accomplish now?
2. What do you feel like is stopping you from achieving this?
3. When you think of married life – what did you always envision it would be like in regards to the finances? What are the finances like? Who takes care of things? What's the division of labor? What's your role? What can you do best for the household?

4. What do you enjoy spending money on the most?

5. Does this increase the value of your life? Why?

6. Do you want more money? Why?

7. How do you think you'll feel when you have more money?

8. What would change, if anything, about your life if you had more money?

9. What is a financial goal that's so important to you that you would spend less to have it?

10. What do you think your spouse/partner thinks of spending, saving and investing?

11. What do you actually think about spending, saving and investing?

12. As a kid, how did you learn about money? What was it like?

13. What are some childhood memories you have with your parents discussing money, having problems with money, giving you money?

14. List 2 things you've purchased that you still feel good about. What feelings come up when you think about these purchases?

15. List 2 things you've purchased that you still feel negative about. What feelings come up when you think about these purchases?

16. You have the option to speak your mind – what does your spouse/partner do with money that you find irksome?

17. How much money do you think you can earn? Why?

18. Who do you feel financially responsible for? Why?

19. Based on everything we discussed, come up with 3 financial goals as a team