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About this Worksheet

This worksheet is designed to help couples answer the money questions discussed in the video

Understand Each Other’s Money story?

What was your relationship with money growing up? (Partner A)
What was your relationship with money growing up? (Partner B)
How did your parents treat money? (Partner A)
How did your parents treat money? (Partner A)

What Do You Want Your Money To Do For You?

- **I want you to imagine that you are financially secure, that you have enough money to take care of your needs, now and in the future. The question is, how would you live your life? What would you do with the money? Would you change anything?**

Partner A Response
Partner B Response

- **This time, you visit your doctor who tells you that you have five to ten years left to live. The good part is that you won't ever feel sick. The bad news is that you will have no notice of the moment of your death. What will you do in the time you have remaining to live? Will you change your life, and how will you do it?**

Partner A Response
Partner B Response

- **This time, your doctor shocks you with the news that you have only one day left to live. Notice what feelings arise as you confront your very real mortality. Ask yourself: What dreams will be left unfulfilled? What do I wish I had finished or had been? What do I wish I had done?**

Partner A Response
Partner B Response

When Do You Want To Retire?

- **How much will be enough in retirement?**

Partner A Response
Partner B Response

- **What do you want retirement to be like?**

Partner A Response
Partner B Response

What Are Your Money Rules?

- **Write down what you would like do with your money and not do with your money?**

Partner A Response
Partner B Response

Establish An Emergency Fund and Sink Fund

- **What is needed for an emergency fund?**

Response

- **Where Are you going to place this emergency fund (Joint savings, one partners account)?**

Response

Establish A Taxable Account

- **Where do you want to start a taxable account?**

Response

Determine Life Insurance Needs

- **What are your needs and what type of insurance is best suited for your situation?**

Partner A Response
Partner B Response

Determine Disability Insurance Needs

- **What are your needs and what type of insurance is best suited for your situation?**

Partner A Response
Partner B Response

Determine Estate Planning Needs

When can you implement the will, power of attorney, and advance medical directive?

Bonuses

Get My Audiobook for Free
www.growwithjoe.me/cheatsheet
Schedule A Discovery Call To Discuss Your Individuals Needs With A Professional
https://calendly.com/info-9146/60minzoom