

My Relationship with Money

1. What does money mean to me?

- | | | |
|------------------------------------|--------------------------------------|--|
| <input type="checkbox"/> Security | <input type="checkbox"/> Power | <input type="checkbox"/> Stress |
| <input type="checkbox"/> Status | <input type="checkbox"/> Creativity | <input type="checkbox"/> Investment |
| <input type="checkbox"/> Comfort | <input type="checkbox"/> Opens doors | <input type="checkbox"/> A chore |
| <input type="checkbox"/> Work | <input type="checkbox"/> Evil | <input type="checkbox"/> Balance |
| <input type="checkbox"/> Joy | <input type="checkbox"/> Freedom | <input type="checkbox"/> Means to an end |
| <input type="checkbox"/> Providing | <input type="checkbox"/> Peace | <input type="checkbox"/> Other: _____ |

2. If I received an unexpected check in the mail, what would I do?

3. I am a spender / saver (circle one)

4. On a scale of 10 to 1, what is my level of satisfaction with my financial health?

10 9 8 7 6 5 4 3 2 1
I've got this I'm working on it I'm struggling

5. My guilty spending pleasure is ... _____.

6. I shop most often when I ...

7. I worry most about money when ... _____.

8. Tools I use to help manage my money include:

- | | | |
|---|---|--|
| <input type="checkbox"/> Budget sheet | <input type="checkbox"/> Cash envelopes | <input type="checkbox"/> Accountability partner |
| <input type="checkbox"/> Budget/Finance app | <input type="checkbox"/> Checkbook ledger | <input type="checkbox"/> Auto-savings |
| <input type="checkbox"/> Online banking | <input type="checkbox"/> Bill-pay reminders | <input type="checkbox"/> Financial advisor |
| <input type="checkbox"/> Auto-pay bills | <input type="checkbox"/> Spending journal | <input type="checkbox"/> Bookkeeper/ Accountant |
| <input type="checkbox"/> Direct deposit | <input type="checkbox"/> Receipt scanner | <input type="checkbox"/> Books/ online resources |
| <input type="checkbox"/> Bookkeeping software | <input type="checkbox"/> Filing system | <input type="checkbox"/> HSA/ FSA Account |
| <input type="checkbox"/> Spreadsheet | <input type="checkbox"/> Dave Ramsey | <input type="checkbox"/> Other: |

9. What tools would I like to learn more about?



10. How does my relationship with money effect the significant others in my life?

11. How much time do I spend on my finances? _____ minutes per day / week / month (circle one)

12. One thing I could do to simplify my finances is ... _____.

13. What is getting in the way of strengthening my financial health?

14. What are my immediate financial concerns?

- | | | |
|--|--|--|
| <input type="checkbox"/> Pay bills | <input type="checkbox"/> Save for large purchase | <input type="checkbox"/> Financial independence |
| <input type="checkbox"/> Pay off car loan/ credit card | <input type="checkbox"/> Debt collectors | <input type="checkbox"/> Budget planning |
| <input type="checkbox"/> Reliable transportation | <input type="checkbox"/> Change spending habits | <input type="checkbox"/> Childcare |
| <input type="checkbox"/> Home maintenance | <input type="checkbox"/> Build emergency fund | <input type="checkbox"/> Medical expenses |
| <input type="checkbox"/> Find new housing | <input type="checkbox"/> Education expenses | <input type="checkbox"/> Maintain steady income |
| <input type="checkbox"/> Retirement planning | <input type="checkbox"/> Significant life change | <input type="checkbox"/> Create/ update will |
| <input type="checkbox"/> Growing investments | (death, divorce, job loss) | <input type="checkbox"/> Financial conflict with |
| <input type="checkbox"/> Spend more than I make | <input type="checkbox"/> Student loan debt | significant others |
| <input type="checkbox"/> Can't afford my mortgage | <input type="checkbox"/> Supporting family members | <input type="checkbox"/> Other: _____ |

15. My long-term financial goals include:

1. _____
2. _____
3. _____

16. How am I feeling right now? What emotions and/ or physical sensations come up when I talk about money?

