

Have the "Money" Talk

Need some help talking about financial goals with your partner? Use this printable set of conversation cards to start a dialogue about your shared financial future.

STEP 1: SET GOALS

What does a successful outcome of this conversation look like to each person?

STEP 2: TALK IT OUT

HISTORY

What's your biggest regret purchase?

GOALS

Which is a bigger priority right now, saving money or paying down debt?

HABITS

What did you spend money on recently that you didn't tell me about because you thought I'd disapprove?

HISTORY

Have you ever had a bill you could not pay? If so, what did you do?

GOALS

What big purchase or expense are we saving up to spend on next?

HABITS

What is the minimum balance you feel comfortable with in our checking account at any given time?

HISTORY

On a scale of 1-10, how would you rate your confidence level in making financial decisions?

GOALS

If we have children, how do we plan to support them through college?

HABITS

If you have the money, do you pay off your credit card bill completely or just what's due that month?

HISTORY

If you went to college, how did you pay for it?

GOALS

Do you know your credit score, and if so, are you happy with it?

HABITS

How many meals a week to you eat out?

