

A 'Couple' Questions

24 Money Questions for Couples

1. Overall, how do you feel about our money situation in one word?
2. What was your first memory around money?
3. What do you feel is the purpose of money?
4. What did money feel like to you growing up?
5. Do you want to be in a similar financial situation as your parents were?
6. What were the main messages your parents taught you about money? Directly or indirectly?
7. Did your parents help pay for your college/university? Do you feel you should pay for your children's university?
8. Did your parents help you out financially as an adult in anyway?
9. Do you feel you need to financially help out your aging parents?
10. Do we have a written financial plan?
11. Do we have a plan to help out our children or aging parents? How does that sit with each of us?
12. What is our stance as a couple on lending our money out?
13. What is our stance as a couple on tithing and charity donations? Do we have specific churches/charities/causes we like to support and for how much?
14. If you could change two things about our financial situation, what would they be?
15. What is our natural money tendency? Are we both spenders or savers or one of each?
16. How do we feel about our debt? Do we have a plan to get out of debt?
17. Do we like how we deal with financial matters on a day-to-day basis? Does it work for us?
18. What causes you the most frustration in our relationship about money?
19. What is one short term money goal we can work on together?
20. What are our long term financial goals we can work on together?
21. How do we feel about where our money goes and our investments? Does it align with the future we are trying to build?
22. Do we have proper insurance coverage? (Life Insurance, Disability, Critical Illness, Dental & Drug Benefits, Extended Health Benefits, Home, Auto?)
23. What legacy do we want to leave? What legacy are we leaving right now?
24. How often should we discuss our financial matters and where should we have this conversation? (Plan a weekly/monthly money date!)

