



## FINANCIAL PARTNERSHIP QUESTIONS

### GETTING TO KNOW YOU

1. How much do you earn? Gross (grand total before taxes and deductions including bonuses) and what is your take-home pay?
2. How much debt do you have? This is probably the most important question you can ask a financial partner and includes student loans, personal loans, business loans, mortgages, car loans, tax debt, credit card debt, medical debt, anything in collections, etc.
3. Have you ever declared bankruptcy and would you want to declare bankruptcy if we ever found ourselves in a tough spot?
4. Do your parents, employers or other people pay any of your current bills?
5. How much are you willing / planning to spend on helping your parents in the future? Siblings? Charity?
6. How much do you think vacations should cost?
7. Are you planning to go back to school in the future? Would you take out loans?
8. If we were to merge money, who will be in charge of paying our bills? Investing for the long term?
9. What is the maximum I could spend on something before consulting you?
10. Are you open to monthly, quarterly and/or annual household budgeting meetings? Would you seek financial counseling if we decided we need it?



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### FAMILY PLANNING

1. How much do you think we should spend on our wedding? Can we work together on the wedding budget? What's your vision for our honeymoon?
2. How many kids do you want to have?
3. How much are you willing to spend on fertility treatments or adoption if we have trouble conceiving?
4. What do you envision childcare looking like?
5. Do you want our kids to go to public or private school?
6. Do you plan on paying for our children's college education or taking out loans?

### VALUES AND FAMILY HISTORY

1. What is your earliest money memory?
2. What is your most joyful money memory?
3. What is your most painful money memory?
4. What was the socioeconomic status of your family of origin, and how did this impact your relationship with money?
5. What was the original socioeconomic status of your parents growing up, how did this impact their relationship with money?



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6. Name three things you learned from your mom about money, either directly or indirectly.
7. Name three things you learned from your dad about money, either directly or indirectly.
8. What are your financial goals?
9. What are your biggest financial fears?
10. List three values that you would like to guide your life.

### IMPORTANT TOPICS FOR HEALTHY RELATIONSHIPS

1. Name one or more things you're willing to do differently to improve our relationship.
2. Name three things you appreciate or admire about your partner. Can we practice gratitude and acknowledgement routines together?
30. Other juicy topics include: parenting styles, religion, how to deal with family, what beliefs will be instilled into your children, childhood traumas, sexual expectations, partner expectations, family health history, mental health history, bucket list, dream home, career goals, political views, and whatever else comes to mind!