

# EASY CHECK-IN FOR COUPLES

Use this simple checklist to see where you are at. If you are just starting to really look at your finances GOOD FOR YOU FOR STARTING 😊

IDEALS	yes	would love this	working on it	not yet
We are both on the <b>same page</b> around our goals				
We have joint goals <b>and</b> individual goals				
We have <b>short term</b> goals & a <b>plan</b> to achieve them (30 days – 2 years)				
We have <b>long term</b> goals & a <b>plan</b> to achieve them (2 years - 5 years)				
We have agreed on the <b>prioritization</b> of our goals				
We have <b>no debt</b> , only a mortgage &/or 1 car payment				
We can have a <b>respectful conversation</b> about money				
We <b>do not fight</b> about money				
<b>SHARED EFFORTS</b>				
We are both aware of <u>our current financial situation</u>				
We are both interested in <u>improving our finances</u>				
We both participate in <u>managing our finances</u>				
We <u>trust each other</u> fully regarding money				
We believe that <u>working together</u> will help us to achieve our goals				
We are both <u>committed to our journey</u> to financial wellness				
<b>NEXT STEPS</b>				
We have agreed on <b>3 things to work on</b> from this checklist				
We will <b>revisit this checklist in 3 months</b> to see how things are moving forward				
We would benefit from <b>relationship counselling</b>				
We would benefit from a <b>money counsellor</b>				
We are <b>happy with where we are</b> at right now				



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