

How to Start the Money Conversation

3 Steps to Create Positive Conversations about Money

CONVERSATION #1: MONEY HISTORY

Answer the questions below to help review your money history, choices, and goals. Ask your partner to write their own answers. Then come together to share. This conversation is meant to help you *understand*, not solve or “fix”.

What are your first money memories?

What was the first big purchase you made entirely on your own? How old were you?

How did your family handle money when you were growing up? How does that affect the way you handle money now?

How would you choose to spend \$1,000?

If you could change one thing about your current financial situation, what would it be?

CONVERSATION #2: LEARN ABOUT YOUR MONEY HABITUDES

Next, go to www.moneyhabitudes.com and follow the intuitive, on-screen instructions to set up your account. Next, complete the online card sort activity. When finished, you will see a quick summary of your personal Money Habitude results. You will also be emailed a full report discussing each habitude in detail with suggestions for next steps. You can access your results at any time by logging back in to your account. Answer the following questions about your card sort results and then share with your partner what you’ve learned about yourself:

My dominant Money Habitudes are:

How do my dominant Habitudes help me stay on track with money goals?

How do my dominant Habitudes deter progress toward my money goals?

CONVERSATION #3: FINANCIAL VISION BOARD

Work together with your partner to create a financial vision board. Use the questions below to help get you started. Next, find visual depictions of your answers to add to your financial vision board. You may use Pinterest and create a “Financial Vision Board” board and add pictures, cut images out of magazines, draw, etc. Be sure the board represents both your answers.

1. What does financial freedom mean to me?
2. What does financial security feel like?
3. What would it take to have financial peace of mind?

