

Couples Love & Money

Checklist

Prepare:

Turn away from external distractions and connect with your partner.

Together, contemplate and discuss your answers and insights about your strengths and areas for improvement in your Love & Money life.

Wealth vision:

To what extent do we share an uplifting spiritual idea of wealth in our relationship?

What's so:

Financial assets, liabilities and responsibilities from the past

Current net worth, income, financial facts

What's possible:

Goals: six months, one year, five years

Spiritual qualities to embody, study and share

Projects/gifts/dreams

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Spirituality: What reality are we serving?

Our shared spiritual practices

How we want to grow spiritually

Beliefs: What game are we playing?

What's a win for us as a couple in terms of projects, people and ideas?

What beliefs are we empowering?

Habits: How are we growing together?

What money tasks can we bless together?

Where can we serve together?

What spiritual giving are we doing?

What's the flow of our money management?

Percentage of income to giving, investing, play and expenses.

Spending agreements: dollar amounts for individual/ joint decisions, who handles the bills, and other financial agreements.

Wills, trusts, insurance, legal issues and goals.

Accounting, software, mechanics of money management.

Our expansion plan: What financial, spiritual or educational growth will support us?