

Financial Date Night Guidebook



Step 1: Know Your Values

What are your key values? From this list, choose the values that are most important to you. Share your top three to five with your partner.

Accomplishment	Creativity	Friends	Learning	Religion
Accountability	Credibility	Fulfillment	Liberty	Reputation
Accuracy	Decisiveness	Fun	Location	Respect of others
Achievement	Dedication	Generosity	Love	Responsibility
Adventure	Dependability	Gratitude	Loyalty	Safety
Affection	Dignity	Growth	Marriage	Security
Ambition	Discipline	Happiness	Meaningful work	Self-esteem
Arts	Diversity	Harmony	Merit	Self-respect
Authority	Effectiveness	Health	Nature	Serenity
Balance	Efficiency	Helping	Optimism	Service
Caretaking	Empathy	Honesty	Orderliness	Sophistication
Challenge	Empowerment	Improvement	Peace	Spirit
Change	Enjoyment	Independence	Persistence	Spirituality
Collaboration	Equality	Individuality	Personal growth	Stability
Community	Ethics	Influence	Physical challenge	Status
Compassion	Excellence	Innovativeness	Pleasure	Stewardship
Competition	Excitement	Integrity	Power	Teamwork
Confidence	Fairness	Involvement	Privacy	Time freedom
Convenience	Family	Job security	Public service	Trust
Cooperation	Flexibility	Joy	Purity	Truth
Country	Freedom	Knowledge	Quality relationships	Wealth
Courage	Friendliness	Leadership	Recognition	Wisdom

Discussion Questions

- What does financial success mean to you?
- And what gives you financial stability?

Step 2: Communication & Avoiding Assumptions

Discussion Questions

- Did your parents talk about money with you growing up?
- And in your household, who primarily took care of the finances?

Notes

Step 3: Setting Shared Goals

Discussion Questions

- What do you want to accomplish together in the next year?
- And what do you want to accomplish in the next five years?

Notes

Creating a Mission Statement

Our Mission Statement

Follow-up

Our next financial date night to check-in on our shared goals is scheduled for _____

Live confidently!

Learn more about our financial videos, tools, and resources.

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