

Couple's Love and Money Checklist

Prepare and Reflect

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 and 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

Spirituality: What Reality are we Serving?

Our shared spiritual practices

How we want to grow spiritually

Beliefs: What Game are we Playing?

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

What beliefs are we empowering?

Habits: How are we Growing?

What money tasks can we bless together?

Where can we serve together?

What spiritual giving are we doing?

What is 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

What financial, spiritual, or educational growth will support us next?