FREQUENTLY-ASKED QUESTIONS ABOUT MARRIAGE AND MONEY

PLEASE RATE THESE QUESTIONS BY IMPORTANCE TO YOU

5 = VERY IMPORTANT 0 = NOT IMPORTANT AT ALL

SP 1 SP 2

* WHAT IS THE BEST WAY TO MAKE MONEY DECISIONS? \_\_\_\_\_\_ \_\_\_\_\_\_
* SHOULD WE HAVE SEPARATE OR JOINT ACCOUNTS OR BOTH? \_\_\_\_\_\_ \_\_\_\_\_\_
* SHOULD WE COMBINE EVERYTHING RIGHT AWAY? \_\_\_\_\_\_ \_\_\_\_\_\_
* WHICH MONEY DECISIONS NEED TO BE MADE JOINTLY? \_\_\_\_\_\_ \_\_\_\_\_\_
* SHOULD WE FILE TAXES JOINTLY OR SEPARATELY? \_\_\_\_\_\_ \_\_\_\_\_\_
* SHOULD WE WORK ON OUR COMMUNICATION SKILLS? \_\_\_\_\_\_ \_\_\_\_\_\_
* SHOULD WE SHARE EVERYTHING 50/50? \_\_\_\_\_\_ \_\_\_\_\_\_
* WHAT IF ONE OF US MAKES A LOT MORE THAN THE OTHER? \_\_\_\_\_\_ \_\_\_\_\_\_
* WHAT IF ONE OF US IS NO GOOD WITH MONEY? \_\_\_\_\_\_ \_\_\_\_\_\_
* HOW DO WE HANDLE THE DEBT WE BRING TO THE MARRIAGE? \_\_\_\_\_\_ \_\_\_\_\_\_
* SHOULD WE MAP OUT OUR “MONEY PERSONALITIES?” \_\_\_\_\_\_ \_\_\_\_\_\_
* DO WE NEED A WILL? A TRUST? \_\_\_\_\_\_ \_\_\_\_\_\_
* DO WE NEED A PRE-NUPTUAL AGREEMENT? \_\_\_\_\_\_ \_\_\_\_\_\_
* WHAT OTHER DOCUMENTS SHOULD WE HAVE \_\_\_\_\_\_ \_\_\_\_\_\_
* DO WE NEED LIFE INSURANCE? HOW MUCH? \_\_\_\_\_\_ \_\_\_\_\_\_
* HOW CAN WE SAVE UP FOR A HOUSE? \_\_\_\_\_\_ \_\_\_\_\_\_
* HOW MUCH SHOULD WE SAVE FOR OUR KIDS COLLEGE? \_\_\_\_\_\_ \_\_\_\_\_\_
* SHOULD WE BE PERFECTLY MONEY-HONEST W/EACH OTHER? \_\_\_\_\_\_ \_\_\_\_\_\_
* DO WE NEED A MONTHLY/WEEKLY BUDGET? \_\_\_\_\_\_ \_\_\_\_\_\_
* HOW MUCH SHOULD WE SAVE FOR RETIREMENT? \_\_\_\_\_\_ \_\_\_\_\_\_
* SHOULD WE ESTABLISH FINANCIAL GOALS? \_\_\_\_\_\_ \_\_\_\_\_\_
* SHOULD WE HAVE SEPARATE ROLES MANAGING OUR MONEY? \_\_\_\_\_\_ \_\_\_\_\_\_
* DO WE NEED A PROFESSIONAL FINANCIAL ADVISOR? \_\_\_\_\_\_ \_\_\_\_\_\_
* HOW CAN WE ENLIST OUR UNIQUE TALENTS? \_\_\_\_\_\_ \_\_\_\_\_\_
* DO WE NEED TO DISCLOSE ALL OUR ASSETS AND DEBTS? \_\_\_\_\_\_ \_\_\_\_\_\_
* WHAT’S A SAFE WAY TO TALK ABOUT OUR MONEY ISSUES? \_\_\_\_\_\_ \_\_\_\_\_\_
* HOW DO CULTURAL DIFFERENCES AFFECT FINANCES? \_\_\_\_\_\_ \_\_\_\_\_\_
* SHOULD WE HAVE A MARRIAGE COUNSELOR? \_\_\_\_\_\_ \_\_\_\_\_\_
* HOW CAN I GET HIM (HER) TO LISTEN BETTER? \_\_\_\_\_\_ \_\_\_\_\_\_
* HOW MUCH SHOULD WE HAVE IN AN EMERGENCY FUND? \_\_\_\_\_\_ \_\_\_\_\_\_
* HOW DO WE SET BUDGETS AND KEEP TRACK OF EVERYTHING? \_\_\_\_\_\_ \_\_\_\_\_\_
* HOW DO WE FIX OUR CREDIT SCORES? \_\_\_\_\_\_ \_\_\_\_\_\_
* WHAT MAKES A HEALTHY RELATIONSHIP WITH MONEY? \_\_\_\_\_\_ \_\_\_\_\_\_