

FREE INTRODUCTORY WORKSHOP

SATURDAY, FEBRUARY 2, 2019

9AM – 12NOON

1260 N DUTTON AVE CONFERENCE ROOM

Your marriage is a financial partnership that is likely to handle several millions of dollars over your lifetimes. Mr. Kirby will be presenting answers to the most frequently-asked questions about money issues for young couples. Bring your questions.

EMAIL rob@taxoasis.com to reserve your space!!!!

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

1. WHAT IS THE BEST WAY TO MAKE MONEY DECISIONS? \_\_\_\_\_\_ \_\_\_\_\_\_
2. SHOULD WE HAVE SEPARATE OR JOINT ACCOUNTS OR BOTH? \_\_\_\_\_\_ \_\_\_\_\_\_
3. SHOULD WE COMBINE EVERYTHING RIGHT AWAY? \_\_\_\_\_\_ \_\_\_\_\_\_
4. WHICH MONEY DECISIONS NEED TO BE MADE JOINTLY? \_\_\_\_\_\_ \_\_\_\_\_\_
5. SHOULD WE FILE TAXES JOINTLY OR SEPARATELY? \_\_\_\_\_\_ \_\_\_\_\_\_
6. SHOULD WE WORK ON OUR COMMUNICATION SKILLS? \_\_\_\_\_\_ \_\_\_\_\_\_
7. SHOULD WE SHARE EVERYTHING 50/50? \_\_\_\_\_\_ \_\_\_\_\_\_
8. WHAT IF ONE OF US MAKES A LOT MORE THAN THE OTHER? \_\_\_\_\_\_ \_\_\_\_\_\_
9. WHAT IF ONE OF US IS NO GOOD WITH MONEY? \_\_\_\_\_\_ \_\_\_\_\_\_
10. HOW DO WE HANDLE THE DEBT WE BRING TO THE MARRIAGE? \_\_\_\_\_\_ \_\_\_\_\_\_
11. SHOULD WE MAP OUT OUR “MONEY PERSONALITIES?” \_\_\_\_\_\_ \_\_\_\_\_\_
12. DO WE NEED A WILL? A TRUST? \_\_\_\_\_\_ \_\_\_\_\_\_
13. DO WE NEED A PRE-NUPTUAL AGREEMENT? \_\_\_\_\_\_ \_\_\_\_\_\_
14. WHAT OTHER DOCUMENTS SHOULD WE HAVE \_\_\_\_\_\_ \_\_\_\_\_\_
15. DO WE NEED LIFE INSURANCE? HOW MUCH? \_\_\_\_\_\_ \_\_\_\_\_\_
16. HOW CAN WE SAVE UP FOR A HOUSE? \_\_\_\_\_\_ \_\_\_\_\_\_
17. HOW MUCH SHOULD WE SAVE FOR OUR KIDS COLLEGE? \_\_\_\_\_\_ \_\_\_\_\_\_
18. SHOULD WE BE PERFECTLY MONEY-HONEST W/EACH OTHER? \_\_\_\_\_\_ \_\_\_\_\_\_
19. DO WE NEED A MONTHLY/WEEKLY BUDGET? \_\_\_\_\_\_ \_\_\_\_\_\_
20. HOW MUCH SHOULD WE SAVE FOR RETIREMENT? \_\_\_\_\_\_ \_\_\_\_\_\_
21. SHOULD WE ESTABLISH FINANCIAL GOALS? \_\_\_\_\_\_ \_\_\_\_\_\_
22. SHOULD WE HAVE SEPARATE ROLES MANAGING OUR MONEY? \_\_\_\_\_\_ \_\_\_\_\_\_
23. DO WE NEED A PROFESSIONAL FINANCIAL ADVISOR? \_\_\_\_\_\_ \_\_\_\_\_\_
24. HOW CAN WE ENLIST OUR UNIQUE TALENTS? \_\_\_\_\_\_ \_\_\_\_\_\_
25. DO WE NEED TO DISCLOSE ALL OUR ASSETS AND DEBTS? \_\_\_\_\_\_ \_\_\_\_\_\_
26. WHAT’S A SAFE WAY TO TALK ABOUT OUR MONEY ISSUES? \_\_\_\_\_\_ \_\_\_\_\_\_
27. HOW DO CULTURAL DIFFERENCES AFFECT FINANCES? \_\_\_\_\_\_ \_\_\_\_\_\_
28. SHOULD WE HAVE A MARRIAGE COUNSELOR? \_\_\_\_\_\_ \_\_\_\_\_\_
29. HOW CAN I GET HIM (HER) TO LISTEN BETTER? \_\_\_\_\_\_ \_\_\_\_\_\_
30. HOW MUCH SHOULD WE HAVE IN AN EMERGENCY FUND? \_\_\_\_\_\_ \_\_\_\_\_\_
31. HOW DO WE SET BUDGETS AND KEEP TRACK OF EVERYTHING? \_\_\_\_\_\_ \_\_\_\_\_\_
32. HOW DO WE FIX OUR CREDIT SCORES? \_\_\_\_\_\_ \_\_\_\_\_\_
33. WHAT MAKES A HEALTHY RELATIONSHIP WITH MONEY? \_\_\_\_\_\_ \_\_\_\_\_\_