

## **Couples Financial Conversation Guide**

### **A Simple Money Check-In for a Stronger Future Together**

Talking about money can feel uncomfortable, but open communication helps couples reduce stress and build a more secure future. Use these conversation starters to begin a positive discussion about finances with your partner.

#### ***Start With the Big Picture***

- What does financial security look like to you?
- What kind of lifestyle do we want in the future?
- What are our biggest financial priorities as a couple?

#### ***Share Financial Goals***

- What is one financial goal we want to achieve this year?
- What are our top three long-term financial goals?
- What does our ideal retirement look like?

#### ***Talk About Financial Concerns***

- What financial worries keep you up at night?
- What financial habits should we improve together?
- What financial challenges do we want to solve as a team?

#### ***Build a Plan Together***

- Create a monthly financial check-in
- Set savings goals
- Discuss retirement planning
- Consider working with a financial professional

Tip: Schedule a 30 minute 'money check-in' each month to review goals, progress, and future plans.

Financial planning isn't just about money—it's about peace of mind and building a future together.