

Let's talk
Money, Honey!



OH, MY HEART!

Right now our current financial situation makes me feel...

SUNSET VIEWS

I want our retirement to look like.....

DREAM BIG

The first THREE things we would do if we won \$10,000,000 are...

FILL ME UP

Thinking back on what we've spent money on recently, the things I've enjoyed most are....

YOURS, MINE + OURS

The financial and household workload split between us feels...

MILESTONES

The next financial goal that we can celebrate in our relationship will be...

GIMME A HAND

Concerning our finances, I need some help with...
And I can help you with...

LEGACY

Our kids are learning from us that finances are...
Our priority for providing education or inheritance comes before and after...



Money Date

For best results, a few tips:

- Get offsite - leave kids and chores behind!
- Enjoy a glass of your favourite beverage, whatever will put you in your happy place!
- Start by using the prompts on the other side. Talk about where you want to be and WHY.
- Discuss how to achieve your goals.
- Make a list of action items for after your Money Date.
- Enjoy the company of your partner!

Contact me for
a free consultation:

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