

Finance Questions

TO ASK YOUR PARTNER

QUESTIONS ABOUT YOUR **LIFESTYLE CHOICES**

DO YOU WANT TO
BUY A HOUSE?

DO YOU WANT **KIDS?**

ARE YOU COMFORTABLE WITH
YOUR **CURRENT SALARY?**

IS IT MORE IMPORTANT TO
LIKE YOUR JOB OR **MAKE MONEY?**

WHAT IS AN IDEAL
EMERGENCY FUND AMOUNT?

WHAT WOULD YOU **CHANGE**
ABOUT THE **WAY YOU LIVE?**

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QUESTIONS ABOUT YOUR **FINANCE HISTORY**



HOW DID YOUR FAMILY
MANAGE MONEY GROWING UP?

DO YOU HAVE ANY **DEBT**?

ARE YOU MORE OF A
SPENDER OR **SAVER**?

WHAT IS SOMETHING IN YOUR
BUDGET YOU **REFUSE TO GIVE UP**?

WHAT IS YOUR **CREDIT SCORE**?

DO YOU HAVE ANY OTHER
FINANCIAL OBLIGATIONS?



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QUESTIONS ABOUT **THE FUTURE**

WHAT IS YOUR
NEXT BIG PURCHASE?

HOW MUCH DO YOU FEEL
COMFORTABLE SAVING
EACH PAYCHECK?

WHAT **INCOME LEVEL**
WOULD YOU **LIKE TO ACHIEVE?**

WHAT WOULD WE DO
WITH ANY **UNEXPECTED**
INCOME OR **BONUSES?**

WHAT ARE YOUR
FINANCIAL GOALS?

WHAT WOULD YOU LIKE YOUR
RETIREMENT TO LOOK LIKE?
