

Shared Finances Survey

Does the thought of not enough green make you blue?

For each of the statements below, circle how you currently feel:



Have your partner fill out this checklist as well, then discuss your answers together.

Income

- I earn enough money
- My partner earns enough money
- My income will keep growing
- I enjoy my work

Stability

- I don't worry about finances
- Our emergency fund is adequate
- We could weather a financial storm
- Our investments are secure

Savings

- I save money every month
- My partner saves money monthly
- I'll be prepared for retirement
- My partner prepares for retirement

Spending

- I don't spend too much money
- My partner doesn't spend too much
- I budget to monitor my spending
- My partner budgets their spending

Collaboration

- My partner and I have a similar financial approach
- My partner and I have common financial goals
- I feel supported financially by my partner
- I trust my partner with financial decisions

