

Money Date Night

A guided financial check-in for your money, goals, and next steps.

TODAY'S DATE: _____



How are we feeling about money?



Person 1: 😞 😞 😞 😞 😞

Person 2: 😞 😞 😞 😞 😞

NOTES

What's changed since our last money date?



- ☐ Income Changed
- ☐ A bill or expense changed
- ☐ Took on or paid off debt
- ☐ Savings changed
- ☐ An unexpected expense came up
- ☐ A big life change happened
- ☐ Nothing major changed
- ☐ Other: _____

Take a quick money snapshot



Income (monthly) \$ _____

Expenses (monthly) \$ _____

Savings (total) \$ _____

Debt (total) \$ _____

HOW ARE THINGS FEELING OVERALL?

How is our current system working?



- ☐ Combine our money
- ☐ Keep it separate
- ☐ Use a mix of shared and separate
- ☐ Split certain bills
- ☐ Something else: _____

CONVERSATION PROMPTS:

Everything feel fair and responsibilities clear? Is one person carrying more of the financial or administrative load? What do we want to handle differently?

Celebrate a win!



WHAT WENT WELL?

- ☐ Paid a bill on time
- ☐ Added to savings
- ☐ Paid down debt
- ☐ Avoided an unnecessary expense
- ☐ Increased income
- ☐ Had a good money conversation
- ☐ Other: _____

What events are coming up?



- ☐ Birthdays
- ☐ Car Expenses
- ☐ Holidays
- ☐ Home expenses
- ☐ Travel
- ☐ Medical Costs
- ☐ Annual bills
- ☐ School/childcare
- ☐ Other: _____

WHAT DO WE NEED TO PREPARE FOR?

Pick our priority



OUR FOCUS THIS MONTH:

- ☐ Build savings
- ☐ Pay down debt
- ☐ Build savings
- ☐ Prepare for an upcoming expense
- ☐ Spend less in one area
- ☐ Increase income
- ☐ Save toward a goal
- ☐ Other: _____

OUR WHY: _____

Our Next Moves



Person 1:

Person 2:

Commitments for everyone:

The Bigger Picture



ONE THING WE'D LOVE OUR MONEY TO MAKE POSSIBLE?

SHOW YOUR GOAL HERE