



Your Relationship with Money

Client Name _____ Date _____

Every person thinks differently about money and our personal finances. Our thoughts are shaped of many things; lessons that we learned from our parents, siblings, friends, and others who had an influence on us growing up; things that we have learned on our own since we started handling our own money matters; the news and print media. By having a good understanding why you think about money in a certain way can help you change some of the unwanted beliefs and patterns. This questionnaire gives you a starting point into deeper self discovery as it comes to your relationship with money.

Growing up, did your parents discuss money and family finances openly in front of the children, or was that a topic that was discussed behind closed doors?

What lessons or sayings about money did your parents or other family members instill on you as a child? What were you taught about money, and who taught you?

Did your parents take on different roles with family finances? Did both of your parents participate in handling finances, or did they have specialized roles?

What is your earliest memory about money? What kinds of feelings do you associate with that memory?

What kinds of feelings do you associate with money and handling your personal finances now? Do you feel confident, scared, guilt, pleasure, etc.?

How old were you when you first realized that you (your family) had more or less money than some other people?
How did this realization come about? How did it make you feel at the time?

Has lack of money ever held you back from doing things you wanted to do?

What was your first paying job? What did you do with your first paycheck?

What has been your best / worst investment?

What keeps you up at night?

Have you ever worked with a financial advisor?

If we were meeting three years from now, what would you hope to say about our relationship?