CHECKLIST · RELATIONSHIP

FREE PREVIEW

Creating Shared Financial Goals



Shared financial goals promote teamwork and strengthen relationships. Use this checklist to align your financial plans effectively.

10 steps | Print-ready A4

NAME	START	TARGET DATE

1 Discuss Financial Values

Share what money means to each of you, like security or freedom.

TIP *Use open-ended questions like, "What's your biggest financial priority?"*

2 Set Short-Term Goals Together

Identify immediate objectives, like paying off credit cards or building an emergency fund.

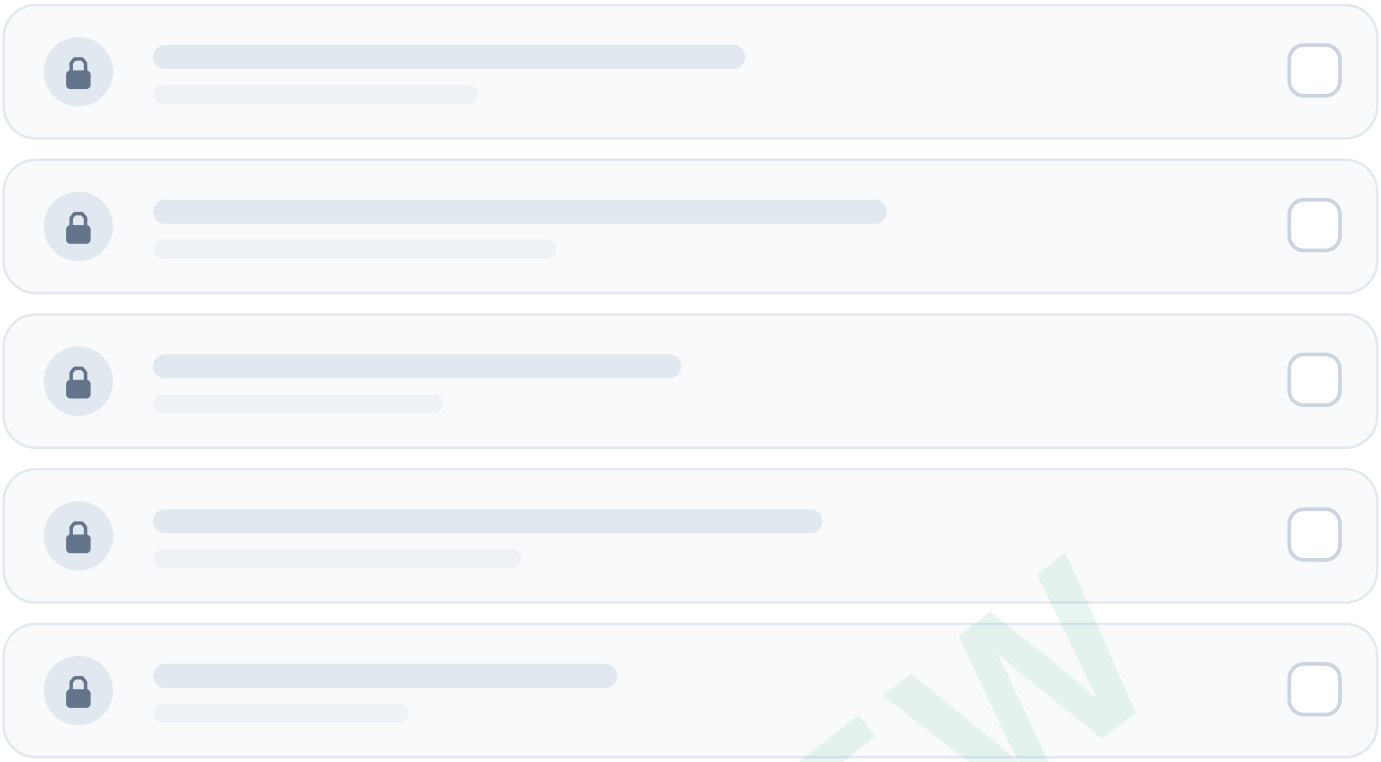
EXAMPLE *"Let's save $1,000 in the next three months for unexpected expenses."*

3 Plan Long-Term Goals

Discuss future milestones, like buying a home or retiring comfortably.

TIP *Break large goals into smaller, actionable steps to stay motivated.*

PREVIEW



Like the design?

Get the full version: every step with examples and tips, a reflection page, no watermark.

Get the full version

PREVIEW