



money date #1

You've got a history... with money. And now is the time for some purposeful self-examination about your relationship with money, your gifts, your values and your fears when it comes to making commitments to your financial future.

Money Matters to Me

Answer the questions on this page privately.

Your partner will do the same, and you'll have the opportunity to come together to share a bit later on.

Select three or write in your own answers.

WHAT ARE your values

- | | | | | |
|--------------------------------------|--|---------------------------------------|---------------------------------------|---|
| <input type="checkbox"/> Adventure | <input type="checkbox"/> Daring activities | <input type="checkbox"/> Forgiveness | <input type="checkbox"/> Intelligence | <input type="checkbox"/> Peace |
| <input type="checkbox"/> Ambition | <input type="checkbox"/> Diversity | <input type="checkbox"/> Friendship | <input type="checkbox"/> Kindness | <input type="checkbox"/> Pleasure |
| <input type="checkbox"/> Authority | <input type="checkbox"/> Devoutness | <input type="checkbox"/> Freedom | <input type="checkbox"/> Knowledge | <input type="checkbox"/> Responsibility |
| <input type="checkbox"/> Beauty | <input type="checkbox"/> Dominance | <input type="checkbox"/> Harmony | <input type="checkbox"/> Leadership | <input type="checkbox"/> Security |
| <input type="checkbox"/> Capability | <input type="checkbox"/> Empathy | <input type="checkbox"/> Helpfulness | <input type="checkbox"/> Love | <input type="checkbox"/> Self-realization |
| <input type="checkbox"/> Cleanliness | <input type="checkbox"/> Enjoying life | <input type="checkbox"/> Honesty | <input type="checkbox"/> Loyalty | <input type="checkbox"/> Self-respect |
| <input type="checkbox"/> Community | <input type="checkbox"/> Exciting life | <input type="checkbox"/> Humility | <input type="checkbox"/> Nature | <input type="checkbox"/> Social justice |
| <input type="checkbox"/> Courage | <input type="checkbox"/> Equality | <input type="checkbox"/> Inclusion | <input type="checkbox"/> Obedience | <input type="checkbox"/> Tradition |
| <input type="checkbox"/> Creativity | <input type="checkbox"/> Equity | <input type="checkbox"/> Independence | <input type="checkbox"/> Open mind | <input type="checkbox"/> Success |

WHAT ARE your gifts

- | | | | | |
|---|--|---|---|---|
| <input type="checkbox"/> Adding humor | <input type="checkbox"/> Creating things | <input type="checkbox"/> Getting things right | <input type="checkbox"/> Moving physically | <input type="checkbox"/> Seeing possibilities |
| <input type="checkbox"/> Advancing ideas | <input type="checkbox"/> Creating trust | <input type="checkbox"/> Giving care | <input type="checkbox"/> Moving others | <input type="checkbox"/> Seeing the big picture |
| <input type="checkbox"/> Analyzing info | <input type="checkbox"/> Designing things | <input type="checkbox"/> Growing things | <input type="checkbox"/> Opening doors | <input type="checkbox"/> Selling intangibles |
| <input type="checkbox"/> Awakening spirit | <input type="checkbox"/> Discovering Resources | <input type="checkbox"/> Healing wounds | <input type="checkbox"/> Operating things | <input type="checkbox"/> Sharing with others |
| <input type="checkbox"/> Breaking molds | <input type="checkbox"/> Doing the numbers | <input type="checkbox"/> Instructing people | <input type="checkbox"/> Organizing things | <input type="checkbox"/> Shaping environments |
| <input type="checkbox"/> Bringing joy | <input type="checkbox"/> Empowering others | <input type="checkbox"/> Investigating things | <input type="checkbox"/> Performing events | <input type="checkbox"/> Solving problems |
| <input type="checkbox"/> Building relationships | <input type="checkbox"/> Exploring the way | <input type="checkbox"/> Making connections | <input type="checkbox"/> Persuading people | <input type="checkbox"/> Starting things |
| <input type="checkbox"/> Building things | <input type="checkbox"/> Facilitating change | <input type="checkbox"/> Making deals | <input type="checkbox"/> Processing things | <input type="checkbox"/> Translating things |
| <input type="checkbox"/> Composing things | <input type="checkbox"/> Fixing things | <input type="checkbox"/> Making things work | <input type="checkbox"/> Researching things | <input type="checkbox"/> Writing things |

What do you want money to do for you?

Money is a tool, or what researchers call a "proximal goal." Most of the time we don't want money just for money's sake, we want it as a way of getting something else – a feeling we want, a goal we seek. Think for a moment about the people, groups and causes you want to positively impact with your resources.

Who do you want to care for and protect?

- | | | |
|---|---|--------------------------------|
| <input type="checkbox"/> Animals | <input type="checkbox"/> Justice | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Children & youth | <input type="checkbox"/> My community | <input type="checkbox"/> _____ |
| <input type="checkbox"/> The environment | <input type="checkbox"/> The global community | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Fellow citizens | <input type="checkbox"/> Local economy | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Healthcare | <input type="checkbox"/> My school | <input type="checkbox"/> _____ |
| <input type="checkbox"/> The marginalized | <input type="checkbox"/> Senior citizens | <input type="checkbox"/> _____ |
| <input type="checkbox"/> My personal growth | <input type="checkbox"/> Veterans | <input type="checkbox"/> _____ |

What causes do you want to fund with your philanthropy?

financial wellbeing purpose statement

Ideally, your Financial Wellbeing Purpose Statement will be inspiring. At the very least, it's good fodder for inner examination and outward discussions with your partner and your family. It might not make grammatical sense - that's OK, some editing is fine too! but think of this as a first draft, a first step toward a more proactive and positive financial future.

Because I value _____,
_____, & _____,
I will use my gifts for _____,
_____ & _____ and use
my limited resources to make a positive
impact on _____,
& _____.

In these uncertain times, I am anxious about
_____, _____, &
_____, but still today make
purpose-based commitments of _____,
_____, & _____
to work toward financial well-being in the years ahead.