

RonaldBlueTrust™

Wisdom for Wealth. For Life.®

Name: _____

Intimacy: \ 'in(t)əməsē\, *n.* close familiarity; closeness or togetherness.

Please check all that apply:

1. Your role in family finances:

- I manage day-to-day bills and spending
- My spouse handles day-to-day bills and spending
- I only get involved for “big” spending decisions
- We jointly make most financial decisions

2. Rank the level of Financial Intimacy (FI) with your spouse:

Low being we have high friction/disagreement/never discuss money; high being good communication/no friction

Low 1 2 3 4 5 6 7 8 9 10 High

3. How do you think your spouse would rank his/her FI with you?

Low 1 2 3 4 5 6 7 8 9 10 High

4. Describe your financial “personality”:

- Spender Generous Fearful Intimidated
- Saver Optimistic Confident Other: _____

5. Describe your overall financial relationship with your spouse, in **one** word:

- Peaceful Engaged Unified
- Combative Disengaged Unsure

6. Money conversations with your spouse are:

- A dreaded topic; avoid like the plague Not always “fun”
- Mostly a non-issue; neither good nor bad Other: _____

7. When do you and your spouse tend to discuss finances?

- Only for big decisions
- We have ongoing dialogue, but mostly about smaller day-to-day issues
- We proactively discuss current and future issues
- We reactively discuss financial issues when faced with a decision (e.g. emergency, major repair, unforeseen opportunity)
- Other: _____

8. Key “triggers” in your financial world:

- Credit card statement
- Cash balance in the bank
- Day-to-day purchases
- Investment returns
- “We need a budget” conversation
- Things break down
- Vacations
- Giving
- Other: _____

9. When you and your spouse disagree about a financial decision, you typically:

- Take no action
- Yield to your spouse
- Insist on your solution
- Work together toward a unified solution

10. Who is the most influential person in your world, from a financial standpoint?

- Mom/Dad or other relative
- Spouse
- Business associate
- Popular financial speaker (e.g. Dave Ramsey)
- Friend
- Other: _____

11. If your spouse came to you and initiated a discussion about money, you would:

- Not be surprised – it’s always on their mind
- Pass out – your spouse never wants to discuss money
- Feel loved/respected – your spouse knows it is an important topic to you
- Feel cautious – these conversations rarely go well
- Other: _____

12. Conversations around money usually leave me feeling:

- Good
- Bad
- Frustrated
- Disrespected
- Confused
- Valued

Written Response Questions:

Any answers, brief or long, are helpful. You may answer any, all or none.

1. Describe how your parents handled money and what impact that had on you.
2. What is a financial value you want to and don't want to emulate?
3. What are the primary money messages your children are learning from you and your spouse?
4. If you had an extra \$50,000 this year, what would you do with it?
5. If you had one money “do-over” in life, what would it be?