HOW'S YOUR RELATIONSHIP WITH MONEY?

INSTRUCTIONS:

Rate each statement from 1 (Strongly Disagree) to 5 (Strongly Agree).
For each question, just go with your gut. There's no right or wrong answer!

QUESTIONS:

RATING SCALE:

1 2 3 4 5

COMMUNICATION

I avoid certain money conversations or hold back information because it feels uncomfortable.

Differences in money habits, viewpoints, or priorities can create tension in my relationships.

MONEY AVOIDANCE

I sometimes put off looking at or dealing with my finances.

Asking for financial help or advice feels uncomfortable for me.

INVESTING

My feelings about headlines or market volatility can influence my financial or investment decisions.

Some of my decisions about money are based on emotion or instinct rather than a clear plan.

BEHAVIORS & EMOTIONS

Thinking about money brings up strong emotions for me.

I notice myself falling into the same patterns or habits with money over time.

ALIGNMENT WITH VALUES & GOALS

I'm not sure whether my financial decisions reflect what really matters most to me.

I'm not always confident I'm heading in the right direction financially.

CURIOUS ABOUT WHAT YOUR ANSWERS REVEAL?

Want to learn more about what your results might mean and how to strengthen your relationship with money?
Let's explore it together.

Contact us for a complimentary consultation!

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