



# Money Date Quiz



## Be Honest

**Q:** Have you ever hidden a purchase, account or debt from your significant other?

- Yes
- No
- I've only hidden gifts

## Establish Limits

**Q:** How much money are you comfortable spending at one time without talking to your significant other first?

- \$50
- \$100
- \$200
- \$500
- No limit

## Review Your Goals

**Q:** On a scale of 1-5, how important are the following activities to you in retirement? (1 is not important; 5 is very important)

Travel  
 1     2     3     4     5

Dining Out  
 1     2     3     4     5

Moving/downsizing  
 1     2     3     4     5

Relaxing  
 1     2     3     4     5

Time with family  
 1     2     3     4     5

## Assign Homework

**Q:** On a scale of 1-5, how much do you enjoy the following financial chores? (1 means do not enjoy; 5 means enjoy a lot)

Filling out the budget  
 1     2     3     4     5

Paying the bills  
 1     2     3     4     5

Balancing the checkbook  
 1     2     3     4     5

Checking investments  
 1     2     3     4     5

Preparing taxes  
 1     2     3     4     5

## Set Your Next Money Date

**Q:** Are you comfortable finding a financial professional to work with?

- Yes
- No

\*This quiz is designed for both members of a couple to take separately. Compare your answers to see which areas you agree upon and which areas you should discuss more. Remember, there are no right or wrong answers. This is designed to get the conversation started.\*