

Couples Money Check-In Guide

Use this simple checklist to turn your financial conversations into teamwork.

- Pick a relaxed time and place (not during a fight or late at night).
- Share your financial goals first (vacation, home, debt payoff).
- Review all accounts together (checking, savings, investments, debts).
- Discuss upcoming expenses and how you'll handle them. Agree on one small action step to take before your next check-in.
- Celebrate wins, no matter how small!

TOPIC	WHAT WE DECIDED	ACTION STEP	WHO'S RESPONSIBLE
Goals			
Upcoming Expenses			
Debt Repayment			
Savings & Investments			
Other			

Tip: Schedule these check-ins monthly. Make it a routine, not a one-time event, and keep the conversation positive and supportive.