

**DIRECTIONS:** Take a current inventory of how you feel like you all are communicating about your wealth. What stories and beliefs do each of you bring to the table? How have these impacted your behaviors? What education do you feel like you have or you need? Feel free to use the space below as needed or add pages to this brainstorm.

## PARTNER 1

## PARTNER 2

### STORIES

Family, community, environment, & society

### BELIEFS

Translation of our stories

### BEHAVIORS

Actions of our stories & beliefs

### EDUCATION

What we have learned.

**DIRECTIONS:** Now take the time to look forward. What is it that you want your table to look like? Develop your vision, values, and purpose. Please know that this will evolve and may change over time, that is okay. You are allowed to grow and change in your wealth journey.

## PURPOSE

The impact your wealth will make.

## VALUES

Your non-negotiable/boundaries.

## VISION

The look, feel, and experience.

**DIRECTIONS:** Now, take the time to draw out the goals that, together, you will work toward in order for your vision to become a reality. Take into consideration, your current financial status, what will you need to do to get to your goals: more savings, increased income, investment strategy, or hiring a professional.

**GOALS** Purchases, savings, date of importance, projects you want to do, places you want to travel.

**REALITY** Where are you now. What are you willing to take action on to get there?

**DIRECTIONS:** Circle the most important goal that you want to work toward. Set three action items related to this goal. Then set a check-in point to make sure you are making progress to achieving them.

**ACTION ITEMS**

1

2

3

**PROGRESS CHECK**

**DIRECTIONS:** Pick a date and time that you all will have your regular financial date.