



GOAL SETTING QUESTIONNAIRE



PART ONE

GOALS EXERCISE: **DISCOVERY MEETING**

PART TWO

GOALS EXERCISE: **1 OR 2 YEAR REVIEW MEETING**

PART THREE

GOALS EXERCISE: **GOAL PLANNING FOR COUPLES**



GOALS EXERCISE

DISCOVERY MEETING

Date: _____

1. What are your best hopes for your financial future? What else?
2. How would you know if these hopes were realized? What would it look like? How would you feel? What would be different? How would you be different? How will things change in your life if your hopes are realized?
3. What does your version of your own personal financial hell look like? How do you get there?
4. List 5 things that you want and already have
 1. _____
 2. _____
 3. _____
 4. _____
 5. _____

5. List 5 things that you want and do not already have

1. _____
2. _____
3. _____
4. _____
5. _____

6. Describe your childhood—how was your family with money, how did you learn about money? What was it like?

7. How do you want to spend your leisure time?

8. How do you want to spend your social time and family time?

9. What do you want your career path to look like?

10. Finish these sentences:

a. Money is _____.

b. Money was _____.

c. Money will be _____.

11. On a scale of 0-10 with 0 being "I'm not doing anything" and 10 being "I have accomplished all my goals", how would you rate yourself?

1 2 3 4 5 6 7 8 9 10

a. How would a family member or friend rate you in terms of how you're doing?

1 2 3 4 5 6 7 8 9 10

12. Earlier you stated that you were a _____ on the scale, what are you already doing that might in some way contribute to your hopes being met? Why are you rating yourself so highly? (Don't take this the wrong way)

13. What is something you can do today or this week to move yourself ½ a point up on the scale?

14. (If you need help answering the previous question) Is there something you have done in the past that might be useful for you now? a. If yes –what did you do? b. If no –has a family member or friend ever faced an analogous situation? Did they do something that could be useful to you now?

GOALS EXERCISE

1 OR 2 YEAR REVIEW MEETING

Date: _____

1. What does your version of financial heaven look like? How do you get there?

2. What does your version of your own personal financial hell look like? How do you get there?

3. List 5 things that you want and already have

1. _____
2. _____
3. _____
4. _____
5. _____

4. Fill in this grid:

	HAVE:	DO:	BE:
I MUST			
I SHOULD			
I LIKE TO			

5. When do you feel like you're handling money with kindness and virtue? When do you feel like you're compromising your beliefs?

6. Do you feel that dealing with money intrudes on your true purpose in life? If yes, what is that true purpose?

7. How do you want to spend your leisure time?

8. How do you want to spend your social time and family time?

9. What do you want your career path to look like?

10. Finish these sentences:

- a. Money is _____.
- b. Money was _____.
- c. Money will be _____.

11. On a scale of 0-10 with 0 being "I'm not doing anything" and 10 being "I have accomplished all my goals", how would you rate yourself? (Circle one)

1 2 3 4 5 6 7 8 9 10

a. How would a family member or friend rate you in terms of how you're doing? (Circle one)

1 2 3 4 5 6 7 8 9 10

12. Earlier you stated that you were a _____ on the scale, what are you already doing that might in some way contribute to your hopes being met? Why are you rating yourself so highly? (Don't take this the wrong way)

13. What is something you can do today or this week to move yourself ½ a point up on the scale?

14. (If you need help answering the previous question) Is there something you have done in the past that might be useful for you now? a. If yes –what did you do? b. If no –has a family member or friend ever faced an analogous situation? Did they do something that could be useful to you now?

GOALS EXERCISE

GOAL PLANNING FOR COUPLES

Date: _____

1. Now that we've been working together and we've accomplished quite a bit, what are you looking to accomplish now?
2. What do you feel like is stopping you from achieving this?
3. When you think of married life—what did you always envision it would be like in regards to the finances? What are the finances like? Who takes care of things? What's the division of labor? What's your role? What can you do best for the household?
4. What do you enjoy spending money on the most?

5. Does this increase the value of your life? Why?

6. Do you want more money? Why?

7. How do you think you'll feel when you have more money?

8. What would change, if anything, about your life if you had more money?

9. What is a financial goal that's so important to you that you would spend less to have it?

10. What do you think your spouse/partner thinks of spending, saving and investing?

11. What do you actually think about spending, saving and investing?

12. As a kid, how did you learn about money? What was it like?

13. What are some childhood memories you have with your parents discussing money, having problems with money, giving you money?

14. List 2 things you've purchased that you still feel good about. What feelings come up when you think about these purchases?

1. _____

2. _____

15. List 2 things you've purchased that you still feel negative about. What feelings come up when you think about these purchases?

1. _____

2. _____

16. You have the option to speak your mind—what does your spouse/partner do with money that you find irksome?

17. How much money do you think you can earn? Why?

18. Who do you feel financially responsible for? Why?

19. Based on everything we discussed, come up with 3 financial goals as a team

1. _____

2. _____

3. _____