

Money Interview Questions

Read and understand the questions below, then follow the directions.

When getting a better understanding of your relationship with money, it is vital that you see where your ideas and moves come from. The easiest way to do this is by interviewing your past.

Take each area below, and interview the person indicated. Do not make anyone or any system wrong, just learn.

The Past

Parents

What were the rules?
What did they believe in?
How did they impart their wisdom on you?

Siblings

What were the rules?
What did they believe in?
How did they impart their wisdom on you?

School / Education

What were the rules?
What did they believe in?
How did they impart their wisdom on you?

Work / Career

What were the rules?
What did they believe in?
How did they impart their wisdom on you?

Your Spouse

What were the rules?
What did they believe in?
How did they impart their wisdom on you?

Your Past

What was the worst money decision?
What was the best?
What decisions did you make?

The Present

What are the gaps in your money "life"?
How are you spending your wealth?
Where do you want to grow?

The Future

What will you need to live comfortably?
How much surplus to you want?

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