



Building Stepfamilies That Work[©]

Setting Financial Goals Together

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Instructions:

Discuss and resolve each of the following questions with your partner. Write your resolutions on a separate page. (You may want to begin this exercise by listing your current assets and liabilities including such things as: current income, cost of children from first marriage, alimony, household spending, etc.)

Questions:

1. Where do we want to be financially in five or ten years from now?
2. In the event that we have children by this marriage, what kind of lifestyle and circumstances do we want to provide to them?
3. How do we want to provide for children from a past marriage?
4. If either of us should become disabled what financial provisions do we want to make for this family?
5. How do we want to share decision-making responsibilities when it comes to small purchases, large purchases, investments, savings?
6. Do we want to try to pay education costs ourselves and to what extent?
7. What amount of risk is each of us willing to accept so that the rate of return on investment will be larger?
8. What kind of retirement do we want to plan?

Financial Goals.rtf Feb 2008

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