

# Questions to Ask Before Saying "I Do!"

## Past

- ❖ How did you view money growing up?
- ❖ Did your parents talk to you about money?
- ❖ How were your parents at handling money? Did they ever argue about money?
- ❖ Did you ever feel richer or poorer than your friends? How did that make you feel?
- ❖ Do your mom and dad have different philosophies about money?
- ❖ Did you work growing up? Why or why not?

## Present

- ❖ Do you consider yourself a spender or a saver? Why?
- ❖ Financially speaking, where do you see yourself in five to ten years?
- ❖ Can you walk me through your thought process when purchasing a big item, like a car or house?
- ❖ Are you currently saving for the future?
- ❖ What's your charitable giving philosophy?
- ❖ What's your biggest pet peeve regarding money?
- ❖ Do you currently have debt and what are you doing to get out of the hole?



## Future

- ❖ At what age would you like to retire?
- ❖ How much money do you need to retire worry-free?
- ❖ How many children would you like to have?
- ❖ Is saving for their college education important to you?
- ❖ Would you ever consider being a stay-at-home parent?
- ❖ Are you willing to live below your means for a while in order to have something better later in life?
- ❖ What's the most you're willing to pay for a home or a car?
- ❖ Are yearly family vacations important to you?
- ❖ Is it okay to borrow from your family and friends?