

Your Why.

Why is saving important to you?

Why start now?

How would saving impact your life?

How urgent is this need?

What motivates you to save?

Why did you pick up this book?

Your History.

Would you consider yourself a “spender”?

What is your relationship with money?

Does talking about money make you uncomfortable?

Would you consider yourself to be irresponsible with money?

How often do you lend money out?

How often do you borrow money?

When was the last time you lent money to someone?

- Who was it lent to?
- How much money was it?
- Was it repaid?

When was the last time you borrowed money?

- Who was it borrowed from?
- How much money was it?
- Was it repaid?

Is spending an emotional experience for you?

Finish this sentence: “Most of my poor financial decisions have been a result of...”

Aside from bills and necessities, what do you spend your money on?

Do you make quick financial decisions, or do you take some time to think first?

On a scale from 1-10, how comfortable are you with saving?

On a scale from 1-10, how comfortable are you with creating a budget?

On a scale from 1-10, how comfortable are you with talking about money?

What was/is your parent's relationship with money, spending, and debt?

What was/is your parent's relationship with saving and investing?