Money Beliefs Kickstart Guide

These conversations are tricky, but if you understand why your partner feels differently it will be easier to come to a compromise. Use this guide to help start a conversation that gets to the root of both your values.

☐ Who do you want to receive your wealth if you’re no longer able to enjoy it?

☐ Who are the most important people in your lives and how should your wealth be divided among them?

☐ Do you and your partner agree on how much to leave to your children, if any?

☐ Do you want to leave anything to the people or causes you care about?

☐ Do you want to put any parameters around inheritance?

☐ If you and your partner disagree, can you find a compromise with elements that are important to you both?
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