



Instructions

6 Basic Money Questions That Are Worth Discussing

Step-by-Step Instructions:

1. Discuss the goal of this exercise. Review the Tips for Discussion section below to assist you with this dialogue.
2. Hand each participant a copy of the activity: 6 Basic Money Questions That Are Worth Discussing.
3. When both participants have completed the activity, instruct them to exchange answers and discuss their initial thoughts.
4. Once they have discussed their initial thoughts, request that the couple continue their discussion outside of the visit in a private setting. Based on your assessment of the couple's responses, decide if additional steps or resources are needed.

Tips for Discussion and Processing

You may want to begin this topic by acknowledging that, even though the two are a couple, each brings different views about money to the table due to their different experiences and backgrounds. Be aware that this may be a very touchy subject for some and should be treated carefully and respectfully. Case managers are there to facilitate discussion, be sensitive to individual perceptions and offer additional resources if needed. Resources should touch on the subject of money management and credit counseling. Additional resources are also listed below.

The following web site (<https://www.annualcreditreport.com/cra/index.jsp>) should be provided to the couple. It's a free credit report made available once a year to everyone.

Title: Instructions - 6 Basic Money Questions That Are Worth Discussing

Group Size: 10 to 50+; must be even numbered group as they will work in pairs

Time Needed: 20 minutes (discussion times vary)

Goal: To assist couples with creating common goals for your financial future.

Audience: Couples

Special Considerations:

Resources Needed:

- Activity sheet - 6 Basic Money Questions That Are Worth Discussing
- Writing utensils

Resources:

How to Take a Healthy Approach to Finances in Your Relationship

<http://www.wikihow.com/Take-a-Healthy-Approach-to-Finances-in-Your-Relationship>

The Importance of Managing Money: Take the Test

<http://www.mtstcil.org/skills/budget-test.php>

AnnualCreditReport.com

<https://www.annualcreditreport.com/cra/index.jsp>