



# DISCOVER YOUR FINANCIAL MINDSET

**NAME** \_\_\_\_\_

**DATE** \_\_\_\_\_

1. Complete this phrase: Money is \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

2. Choose one: I am a spender or I am a saver? \_\_\_\_\_

3. What amount is in your savings as of today? \$ \_\_\_\_\_

4. What is your dream, if money were no object: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

5. Do you enjoy your occupation? Why or why not? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

What is your dream job and why? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

6. Do you share financial decisions with anyone? \_\_\_\_\_

How often do you discuss your finances together? \_\_\_\_\_

What do you feel when you discuss money decisions? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



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7. What does a budget plan look like to you? \_\_\_\_\_

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8. Where do you volunteer and why? \_\_\_\_\_

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9. What does "TITHE" mean to you? \_\_\_\_\_

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10. Have you asked for help to make a financial decision? YES NO

How does asking for help make you feel? \_\_\_\_\_

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11. Would you seek assistance to pay your bills? YES NO

How would that make you feel? \_\_\_\_\_

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12. If you could help someone make a financial decision or pay their bills, how do you feel about that?? \_\_\_\_\_

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13. How do you reward yourself when you reach a goal? \_\_\_\_\_

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14. Are you planning for retirement? Yes then How? \_\_\_\_\_

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No retirement then Why? \_\_\_\_\_

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15. What does "Leaving a Legacy" mean to you? \_\_\_\_\_

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This is only for you, feel free to share it with anyone you wish but you do not have to share in the class