

Money HISTORY

1 How would you describe your **FAMILY'S** financial circumstances growing up? Did it **CHANGE** over time?

2 How would you describe the way each of your **PARENTS**:

a. ...**HANDLED** money (e.g. saver, spender, investor, impulsive, mindful)?

b. ...**BEHAVED SOCIALLY** in relation to money (e.g. generous, cheap, open, closed)?

3 What were **HOLIDAYS / BIRTHDAYS** like in your household?

a. Did you feel **CELEBRATED**? Yes No *Please explain*

Money History

4

How did you **FIRST LEARN** about money?

a. Were you given an **ALLOWANCE**? Yes No
If **yes**, did you have to do **CHORES** to earn it? What were they?

5

What were you **TAUGHT** by your family/community/culture about people who were **RICH/POOR**?

6

What **ROLE** has money played in your **FAMILY** relationships (e.g.independence, dependence, power, control, joy)?

7

What **ROLE** has money played in your **SOCIAL** relationships (splitting the bill, giving/receiving gifts)?

Money History

8

WHO has a relationship to money that you **ADMIRE**? Why?

9

If your relationship to money was a best-selling **BOOK**, what would the **TITLE** be? Why?