

## **PRE-MARRIAGE QUESTIONNAIRE**

What's Important about money to each of you?

To what extent will you commingle your finances?

Will there be a prenuptial contract? Provisions:

How did your parents manage their money? Do you each want to do likewise? The opposite?

Which of you will pay the bills?

How much can one partner Spend without consulting the other?

Have you put together a family budget?

How much do you plan to save each month?

How much do you plan to donate to charities each year? Which ones?

Do you have financial obligations to other people?

How many children? Any idea when?

What is your investment risk tolerance (1-5)?

What are your short-term (under 3 years) financial goals?

What are your longer-term (3+ years) financial goals?

What's on your mind right now about finances?

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