

Money Beliefs & Behaviors Assessment

Answer the following questions to explore your underlying beliefs about money.

What is your earliest memory of money?

What messages did you receive about money growing up?

How do you feel about money now?

Complete this sentence: "Money is"

How easy or difficult do you find managing money? why?

Money Beliefs & Behaviors Assessment

Rate how often you engage in the following behaviors, using the following scale:

1 2 3 4 5
Never Rarely Sometimes Often Always

Rating(1-5)

- | | |
|--|----------------------|
| 1. I create and stick to a budget | <input type="text"/> |
| 2. Money makes me anxious or stressed | <input type="text"/> |
| 3. I spend impulsively on non-essential items | <input type="text"/> |
| 4. I save a part of my income | <input type="text"/> |
| 5. I invest or have long-term financial plans | <input type="text"/> |
| 6. I feel guilty after spending money on myself | <input type="text"/> |
| 7. I talk openly about money with my partner/family | <input type="text"/> |
| 8. I believe my financial situation is under control | <input type="text"/> |

What do your top 3 scores tell you about your behavior with money?

Are there any patterns you notice between your money beliefs and behaviors?
