

She's on the Money.



Couples Date Night ● Checklist

SET THE SCENE:

Light a candle, grab your favorite snacks, and set the vibe.
This is about connection and progress, not perfection.

STEP 1: CELEBRATE WINS

- What's one financial achievement we're proud of this month?
- Did we hit any goals or make progress we didn't expect?
- Name one thing we enjoyed this month that felt totally worth the spend.

STEP 2: REFLECT & REALIGN

- Where did most of our money go this month?
- Was there anything we spent on that didn't align with our values?
- How do we feel about our savings, investments, and debt progress right now?

STEP 3: DREAM BIG

- What's a financial goal we're excited to work toward next month?
- Is there a big dream or long-term goal we should revisit or update?
- If we had \$10,000 appear tomorrow, what would we do with it?

STEP 4: PLAN AHEAD

- What upcoming expenses do we need to prepare for next month?
(Think: birthdays, holidays, bills, subscriptions, or travel.)
- Is there a financial habit or routine we want to try (e.g., cash envelopes, no-spend days)?
- Are there any decisions or tasks we need to tackle together (e.g., insurance reviews, renegotiating bills)?

STEP 5: SET INTENTIONS

- What's one thing we can cut back on to save more next month?
- How can we celebrate a financial win together that doesn't cost much or anything?
- What's one thing we can each do to support our shared financial goals?

END WITH GRATITUDE:



Thank each other for showing up and committing to your shared financial journey.



Toast to a new month of mindful money moves!

REPEAT NEXT MONTH!



Add this Financial Date Night to your calendar every month so you never miss a chance to connect about your goals.

BONUS FINANCIAL DATE NIGHT PROMPTS

START WITH CONNECTION

- What is your earliest memory of money, and how does it influence your financial decisions today?
- What is one thing you admire about how I handle money?
- How do you feel about the way we approach finances as a team?

TALK GOALS & DREAMS

- What does financial freedom look like to you?
- If we could take one big financial leap this year (e.g., *buying a house, starting a business*), what would it be?
- Where do we see ourselves financially in 5, 10, or 20 years?

EXPLORE YOUR HABITS

- What's one habit that helps us stay on track financially?
- Are there any money habits we've outgrown or should improve?
- How do you feel about the balance between spending on needs, wants, and savings?

CHECK IN ON COMMUNICATION

- Are there any financial topics you find hard to talk about? How can I support you?
- How do you feel about the way we divide financial responsibilities (e.g., *paying bills, tracking spending*)?
- Do we need to update how we communicate about money (e.g., *apps, meetings, text updates*)?

PLAN FOR LIFE'S CURVEBALLS

- What's one financial challenge we've overcome together, and how did it make us stronger?
- Are there any areas of our finances we feel unprepared for (e.g., *emergency fund, insurance*)?
- How do we want to approach unexpected windfalls (e.g., *bonuses, tax refunds*)?

DISCUSS SPENDING & SPLURGES

- What's one purchase that brought you the most joy recently?
- Is there a luxury or experience you'd like to save for and enjoy guilt-free?
- How do we define what's "worth it" when it comes to spending?

END WITH GRATITUDE

- What's one thing we've built together that you're most proud of?
- How has working together on our finances made our relationship stronger?
- What's one fun way we can celebrate our financial wins. big or small?