

She's on the Money.



Solo Date Night ● Checklist

SET THE SCENE:

Light a candle, make your favorite drink, and put on your go-to playlist. This is your time to focus on your financial goals and celebrate your wins.

STEP 1: REFLECT ON THE MONTH THAT WAS

- What was my biggest financial win this month?
- Did I stick to my budget or savings plan? Why or why not?
- What was my most joyful or worthwhile purchase this month?

STEP 2: ASSESS YOUR CURRENT FINANCIAL PICTURE

- How much did I save, invest, or pay toward debt this month?
- Are there any recurring expenses I need to cancel, adjust, or rethink?
- Do I feel like my spending aligned with my values?

STEP 3: PLAN FOR NEXT MONTH

- What is one financial goal I want to achieve next month?
- Are there any upcoming expenses I need to prepare for?
- What's one small habit I can focus on to improve my finances (e.g., *tracking spending daily, meal prepping*)?

STEP 4: DREAM BIG

- What's one long-term goal I'm excited about, and how can I take one step toward it?
- If I received an unexpected \$1,000, what would I do with it?
- How can I make saving or investing feel more exciting next month?

END WITH GRATITUDE:



Write down three things you're grateful for in your financial journey this month.



Celebrate your progress, no matter how small.

REPEAT NEXT MONTH!

Add your Solo Financial Date Night to your calendar to stay on track with your goals and build wealth intentionally.

BONUS SOLO FINANCIAL DATE NIGHT PROMPTS

REFLECT ON YOUR RELATIONSHIP WITH MONEY

- What is one thing I'm proud of in my financial journey so far?
- What's my earliest memory of money, and how has it shaped my current habits?
- What financial lesson have I learned recently, and how can I apply it?

DREAM BIG

- If I could achieve any financial goal in the next 5 years, what would it be?
- What does financial freedom mean to me, and how can I move closer to it?
- If I could live my dream lifestyle, what would it look like?

EVALUATE HABITS & PROGRESS

- What is one habit that has improved my finances?
- Are there any habits I'd like to change or adopt?
- How do I feel about my balance between saving, spending, and investing?

PLAN FOR CHALLENGES & OPPORTUNITIES

- What's one area of my finances that I feel uncertain about? How can I learn more about it?
- How would I handle an unexpected financial windfall?
- Do I have an emergency fund, and how can I strengthen it?

CELEBRATE WINS

- What's the best financial decision I've made recently?
- What's one way I can treat myself without breaking the bank?
- How has my financial progress improved my life so far?