

HOUSEHOLD SHAREHOLDERS MEETING GUIDE

Meeting Date	Meeting Type
January	Recap 2024's highs and lows, plan for 2025
Weekly	Up to 15 minutes to discuss finances
Monthly	Touch base on all objectives set at the January meeting

MEETING ITINERARY

Description
What we want for ourselves
What we want for each other
What we want as a couple
What we want for our family
Budget & Financials
Projects
Concerns
Schedule Future Meetings
Close of Meeting

HOUSEHOLD SHAREHOLDERS MEETING WORKSHEET

I want the following things for myself this year:

I want the following things for you this year:

I want the following things for us as a couple this year:

HOUSEHOLD SHAREHOLDERS MEETING WORKSHEET

I want the following things for our family this year:

I want the following things for our money this year:

These are some projects I'd like to work on for our home this year:

HOUSEHOLD SHAREHOLDERS MEETING WORKSHEET

Here are some concerns I have that we don't talk about much:

Suggestions for future meetings:

Notes:

HOUSEHOLD SHAREHOLDERS GOAL WORKSHEET

AFTER YOU TALK THROUGH YOUR INDIVIDUAL WORKSHEETS, DECIDE ON REALISTIC AND ATTAINABLE GOALS FOR THE YEAR. AVOID USING WORDS LIKE "SHOULD", "MORE" AND "LESS" AS THESE CANNOT BE MEASURED.

Goals for:	Goals for:	Goals for our Marriage:
Goals for our Family:	Goals for our Money:	Goals for our Home/Projects:

Now what?

Set ways to measure your goals, break them up into smaller pieces and check in on your progress often. The biggest key to your success will be open, honest and raw communication with one another. you are a team, equal partners and each other's biggest supporters, together you will be able to do your absolute best.

Good luck!