



## Personal Insights about Money

Client Name \_\_\_\_\_

Date \_\_\_\_\_

**Directions:** Look for clues in your past that will help you to understand your current financial life. Starting with your childhood, what experiences have shaped your underlying beliefs and attitudes about money? What do your patterns of earning, saving, investing, and giving tell about you? Here is a list of questions to guide you in this reflection process.

**1. As a child, my mother (or guardian) taught me that money...**

**2. As a child, my father (or guardian) taught me that money...**

**3. The first time I earned money, I felt...**

**4. In my youth, my biggest concern about money was...**

**5. Today, my biggest concern about money is...**

**6. For me, talking about money is difficult when...**

**7. In my financial life, I am most satisfied when...**