

# How to plan finances with your spouse



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## Set a date

Schedule a monthly financial money date! Preferably, a place with good Wi-Fi.



## Set an agenda

It could be revisiting common goals, a career change, investment shifts or big plans like that dream trip.



## Create your budget

Use budgeting tools or Excel.

Track income (salaries, business income, investment) and expenses (house, car, childcare and food).

### Remember:

Income - Essentials - Saving for goals =  
What's left for fun!



## Keep in mind

It might be tricky but patience & good listening skills are key.

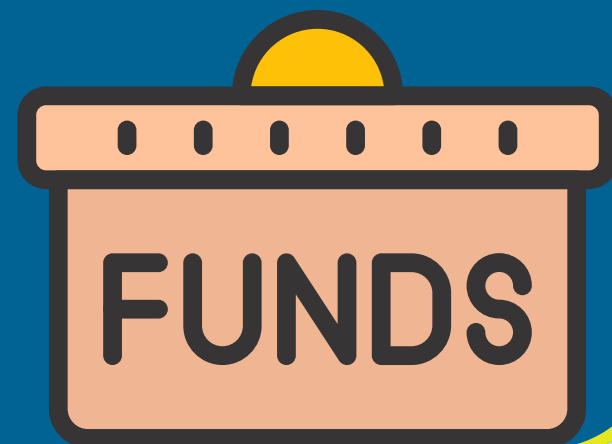
Acknowledge financial interests, celebrate small wins and always schedule the next date!



**DON'T  
FORGET**

## Let good cents prevail

Ensure separate life insurance, keep bumping up emergency funds, plan for retirement, and over-prepare for kids' education.



## Your employees having trouble with savings and debt management?

Financial advisors on WoW can help them take the next step.



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