

My Money Date Planner



FINANCES FOR FEMINISTS

Financial wellness is a journey, not a destination. Set yourself up for success by revisiting your finances on a regular basis.

*Create a calm environment for you to focus.
Grab something soothing for your senses like a hot mug of tea or light a candle. Perhaps you'll put on a fun playlist to set the mood.
Have your login and password credentials handy so you can login to your bank accounts to review as needed.

Frequency

I commit to regular Money Dates!
Select your desired frequency.
Weekly,
Bi-weekly,
Monthly, or
Other (explain)

Exercises

Log into your credit card account(s), checking accounts, Venmo, etc.
Review your spending for the recent week(s). Consider the reflection questions below as you review.

Brainstorm any big expenses coming up. Map out a plan to save for upcoming expenses.
Ex: Travel plans, holiday gifts?

Complete any outstanding Action Items from past Money Dates.

Reflection Questions

Were there any surprises in your spending review?

Consider your core values. How is your recent spending aligned with your values? How is it misaligned?

Are there any spending habits you'd like to adjust? If so, consider a potential plan on how to address this change.

Ex: If I'd like to lower my television consumption I could cancel a streaming service. Be sure to check in on your progress on your next Money Date!

What are you most proud of accomplishing since your last money date?

Ex: Taking time to have a regular Money Date! or Planning ahead to set aside funds to pay for upcoming holiday gifts so I am not scrambling at the end of the year.

Action Items

Are there any action items that have arisen from your spending review? If so, write them down and complete them now or on your next Money Date!

Ex: Cancel Hulu subscription, set up automatic withdrawal from checking account to savings account to save for upcoming travel plans.

Plan your next Money Date and put it on your calendar!

Congratulate yourself on prioritizing your financial well-being!!