

MONEY HABITUDES® IN ACTION

PAT



1 1 0 8 2 2

CASEY



2 7 3 1 2 1

CHRIS



6 3 2 1 2 2

MORGAN



2 1 1 1 8 1

DEVIN



1 0 0 2 0 8

JAMIE



0 2 9 0 1 0

Look at the person's Money Habitudes results and answer the following questions.

- Why would you want to be his/her friend?
- Why would you be concerned for him/her?
- When planning to buy a new car, what would be really important to him/her?
- What challenges might s/he face?
- What advice would you give your friend?

What if two of these people are in a committed relationship or married?

- What do they have in common? How might that be an advantage? A challenge?
- How do they relate to money differently? How might it bring balance in the relationship? How might it cause conflict?
- What would it be like if they were buying a house together? What would be important to each? Where might they disagree?
- Is it different if the two people are business partners buying property together or if they are married and investing together?
- How might they approach saving and investing for the future? Where would they agree or disagree? What would each of them bring to the conversation?