

EXERCISES FOR YOU AND YOUR PARTNER

#2 Create a Money Tree

Visualization is realization so the root “money values” gets met.
Use when tempted by “bad money behavior”

SAMPLE MONEY TREE	
Unlimited travel Retire at age 55 Take the grandchildren to Disneyland Take up surfing Sell family home and downsize Vacation in Hawaii Have plastic surgery Play the stock market Buy a significant piece of jewelry Buy a boat Trade in minivan for sports car	Aspirations
Buy a vacation home Upgrade family home Invest in college funds Pay off first mortgage Eliminate consumer debt	Core Goals
Increase investment in retirement accounts Increase shared income by 25 percent Upgrade one vehicle Buy a three-bedroom house in a good neighborhood Plan for a family	Root Values