

# Money Mindset Checkup

A. In the columns below note/write positive traits or characteristics concerning money you witnessed of your primary caretakers. Use words such as careful, strategic, disciplined, communicative, etc.

Mother	Father	Other
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

**Circle the five most significant traits- the ones that had the most impact on you.**

B. In the columns below, write negative traits or characteristics concerning money you witnessed of your primary caretakers. Use words such as anxious, angry, controlling, irresponsible, secretive, dishonest, etc.

Mother	Father	Other
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

**Circle the five most significant traits- the ones that had the most impact on you.**

C. In the box below write three things you needed most when first learning about money and didn't get from the adults around you.

1. _____
2. _____
3. _____
_____

D. List three times you felt frustrated about money, what you felt, and what you did in response.

Frustrations	What You Felt	How you responded.
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____