

smartpurse



# Create your best money mindset

CHECKLIST

01

## Get to know your money self



7 reflection questions for every occasion. Our money mindset starts to be formed at very early stage. The better you know yourself and the hidden money messages you carry with you, the easier you can develop a natural confidence when it comes to dealing with your finances.

Use this simple checklist to and related reflection questions to figure out how you feel about money. There is no right or wrong it, simply note down the answers, look at them and see if you detect a distinct pattern.

02

## What constitutes a healthy money mindset

- You know how much you earn and spend.
- You see your values reflected in your financial decisions.
- You have clear short-, mid- & long-term financial goals.
- You embrace the good your money can do for the world.
- You can easily talk about your finances.
- You can understand your personal risk tolerance.

03

## Reflection questions to get to know yourself

What money messages do I carry with me? What have my parents told me about money?

?

What does money mean to me? Is this something important?

?

What is success to me?

?

Being rich means?

?

My biggest fear related to money is?

?

If I had a million £, what would I do with it?

?

If I lost all my money tomorrow, what would happen?

?

Now see if there is a pattern? Any strong feelings, be it negative or positive? What do they tell you about yourself?

?

04

## Taking Action

Now note down one action you want to take in the next 3 months to give your money mindset a boost. This can be things you want to do differently, messages you want to get rid of or things you want to do more off. It also can be something as simple as having a money talk with your partner, a friend or employer. Note it down and re-visit once time has passed.

My action:

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We constantly develop new content and guidelines. If you have any questions or recommendations, please let us know and we'll get back to you.

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