

Togetherhness In Finances

A couples exercise

Displayed below is a chart that outlines various household financial roles. While not comprehensive, this chart serves as a starting point to encourage couples to recognize and appreciate the different responsibilities each partner plays in managing family finances. During this exercise, it is important to adopt a relaxed and welcoming posture, recognizing that the fusion of masculine and feminine perspectives on financial matters can enhance family unity.

In the event that a particular financial responsibility lacks adequate representation, couples may choose to assign that role to one or both partners. Additionally, families are free to include any additional financial roles that they feel are relevant to their unique situation.

Masculine	Feminine	
		Monthly Roles
		• The Bill Payer- Gets the bills paid on time
		• The Spreadsheet Guru - Organizes the data into readable reports
		• The Advisor - Gives input on last months spending and next months spending plan
		Big Picture
		• The Investor - Thinks about and tracks the family investments
		• The Net worth manager - Keeps track of the families Net Worth
		• The Credit Monitor - Keeps track of current credit conditions
		For Purchases
		• The Negotiator- Gets deals by negotiation and renegotiation
		• The Hunter - Saves on money purchases, shops for deals
		• The Investigator - Finds out information to make quality purchases
		For Goals
		• The Vision Caster - Sets S.M.A.R.T. Goals for the future
		• The Navigator - Plans a route to where we want to go
		• The Cheerleader- Celebrates wins along the way
		Additional Household Roles (discuss)

