

Your Money Checklist: Your Financial Past, Present, and Future

Okay, you got your partner to sit down and talk money. Now what do you talk about? Here's a checklist to help you out.

YOUR FINANCIAL PAST

- Credit cards you've opened
- Loans you've taken out
- Foreclosures, bankruptcies, debt that's been settled or charged off
- How you've dealt with money in the past
- How your parents dealt with money when you were growing up

YOUR FINANCIAL PRESENT

- Outstanding debt you owe
- Debt you're actively paying off, including credit cards, student loans, mortgages
- Interest rates on those debts
- Your income or salary
- Money owed to you
- Active financial accounts
- Your budget
- Your money personality

YOUR FINANCIAL FUTURE

- Debt-payoff goals
- Savings goals
- Retirement goals