

## My Financial Autobiography

Know yourself! This exercise will help you write your own financial autobiography (map of your life and money). Think through how you have developed your financial values and habits over the years.

Jot down brief notes in the following categories and talk them over with your spouse (or accountability partner, if single).

**A. Family history** – *How did your parents handle money in your childhood home? What events or decisions had a major impact on the outcome? How did they approach their offerings? Their savings? Their generosity?*

**B. Personal history** – *Trace the path of your connections with money. How did you handle money when you first received some? What financial decisions through the years have been good... which have been poor?*

**C. Present case** – *How do you handle money today? How much has passed through your hands since you started working?*

**D. Current and potential financial picture** –

- ◆ How much money do you anticipate will flow through your hands:
  - in the next 10 yrs \$ \_\_\_\_\_
  - until retirement (if longer than 10 years) \$ \_\_\_\_\_
- ◆ Your present cash flow and assets (see separate sheets).