

Couple Financial Mission Statement

A financial mission statement describes a desired future financial state for a couple. Mission statements are a powerful tool for creating a unity of purpose and focusing the attention of a couple. It provides a guiding “star” for decisions and reflects the couple’s values and concerns.

When exploring your mission statement, consider the following:

- Based on your core values, is it meaningful and compelling?
- Does it represent your collective commitment to one another as a couple?
- Does it reflect a future focus or direction?
- Are there actionable steps?
- Is there a timeline?

Some of the areas that could be addressed are:

- The important lessons learned in your lives – values and priorities.
- People and causes for which you feel a sense of responsibility.
- What you need to occur to feel confident about your financial future.
- The type of feedback and communication you would like with your financial advisor.
- The financial education you would like your financial advisor to provide.

Creating a Couple Financial Mission Statement

Please take some time to write a joint mission statement. The goal is to outline your financial priorities and values in an effort to provide a roadmap for future financial decisions.
