

Money Autobiography Questionnaire

1. What is your first memory of money?
2. What is your happiest moment with Money? Your unhappiest?
3. What is your cultural heritage? How has it been impacted by Money?
4. Did your family come to America for any motive related to Money? When?
5. What else do you know about your family's economic circumstances historically?
6. What happened to your parents during the depression?
7. How is/was the subject of Money addressed by your church or the religious traditions of your forebears?
8. How did your family communicate about money?
9. Which of your parents' or ancestors' money decisions continue to affect you today? How? Be specific.
10. How did your mother address Money? Your father? How did they differ?
11. How did they address Money in their relationship? Did they argue or maintain strict silence. How did that impact you?
12. Same questions regarding your partner(s).
13. How did you relate to Money as a child? Did you feel poor/rich. Were you anxious about Money?
14. Same questions as a teenager, young adult, older adult?
15. Have your attitudes shifted during your adult life? Describe.
16. Are you Money motivated? If so, why? If not, why not?
17. How do you feel about your present financial situation? Are you financially fearful or resentful? How do you feel about that?
18. Will you inherit Money? How does that make you feel?
19. If you are well-off today, how do you feel about the Money situations of others? If you feel poor, same question.
20. How do you feel about begging? Welfare?
21. If you are well-off today, why are you working?
22. Do you worry about your future?
23. Are you generous or stingy? Do you treat? Do you tip?
24. Do you give more than you receive or the reverse? Would others agree?
25. Could you ask a close relative for a business loan? For rent/grocery money?
26. Could you subsidize a non-related friend? How would you feel if that friend bought something you deemed frivolous?
27. Do you judge others by how you perceive they deal with *their* Money?
28. Do you feel guilty about your prosperity?
29. What part does Money play in your spiritual life?
30. Do you live your Money values?

This Money Autobiography was developed by Richard Wagner, JD, CFP of Sharkey, Howes, Wagner & Javer, Inc. in Denver, Colorado. Cambridge Advisors, LLC thanks Mr. Wagner for his willingness to share this with us and his permission to include this as an insert to this Quarterly Capsule.