



The Taresh Couple Wealth Checklist™

A Companion to the Couple Finance Formula™ Masterclass
Your Quick-Start Guide to Clarity, Confidence, and Control—Together

✓ Instructions: As a couple, go through each of the following 21 checkpoints. For each, mark: ☒ YES — We've done this ? TO DISCUSS — We need to talk about this ✗ NO — We haven't started yet

SECTION 1: MINDSET & CLARITY (Aligned with Lessons 1 & 2)

1. Have we discussed what money truly means to each of us?
 2. Have we identified limiting beliefs we carry around money?
 3. Have we created a Shared Financial Vision Board together?
 4. Do we see money as a tool for freedom, security, and purpose?
 5. Do we regularly discuss money goals and dreams without judgment?
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SECTION 2: AWARENESS & ALIGNMENT (Aligned with Lessons 3 & 4)

6. Do we both know our current monthly income?
 7. Do we track our fixed and flexible monthly expenses?
 8. Have we reviewed our credit cards, loans, and EMIs together?
 9. Do we use a joint money tracker or app?
 10. Do we know our total savings, investments, and liabilities?
 11. Have we committed to learning or monetizing a skill to grow our income?
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SECTION 3: HABITS & LIFESTYLE (Aligned with Lesson 5)

12. Are we part of a growth-oriented circle of couples or professionals?
 13. Do we consume finance content together (books, videos, creators)?
 14. Have we attended a financial literacy session or webinar this month?
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SECTION 4: SAFETY & PLANNING (Aligned with Lesson 6)

15. Do we each have active term and health insurance plans?
16. Do we maintain a Couple Financial Folder with documents & logins?

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- 17. Have we built an emergency fund covering at least 3 months of expenses?
 - 18. Do both of us know how to access our key financial resources?
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SECTION 5: ACTION & MOMENTUM (Aligned with Lesson 7)

- 19. Have we started at least one SIP together?
 - 20. Do we conduct monthly money check-in conversations?
 - 21. Have we clearly defined and written down our top 3 short-term and 3 long-term financial goals?
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◆ CLOSING NOTE: Every couple deserves to feel calm, confident, and aligned with their financial life. Use this checklist as your starting point.

What you mark as "TO DISCUSS" is where your next money conversation begins. What you mark as "NO" is your next opportunity. What you mark as "YES"? Celebrate it!

You're not aiming for perfection—you're building clarity.

 Brought to you by:
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