



## **The Joint Financial Vision Board Template** *Define Your Shared Values, Life Goals & Dream Milestones—Together*

### **The Taresh Couple Vision Board™**

#### **Purpose:**

This printable and digital template helps young married couples create a visual map of their shared financial and life dreams. It combines goal clarity, value alignment, and emotional connection into a single powerful exercise.

#### **Why It Works:**

Couples who visualize their dreams together make better financial decisions together. This vision board will serve as your motivational anchor, helping you stay aligned, inspired, and purpose-driven—especially when things get busy or uncertain.

#### **How to Use This Template:**

##### **Step 1: Print It or Use Digitally (Google Slides / Canva)**

Choose your preferred format—print it out and paste it on a wall, or edit digitally using tools like Canva or Google Slides.

##### **Step 2: Schedule Your "Dream Date Night"**

Block an hour, grab chai or wine, play some relaxing music, and sit down to fill this together.

##### **Step 3: Fill in Each Section Below (use cut-outs, sketches, icons, or words)**

##### **Step 4: Place It Where You'll See It Weekly**

Put it somewhere visible (bedroom, fridge, digital wallpaper) and revisit monthly.



## The Couple Vision Board™ Layout:

### 1. Our Shared Financial Values

"What really matters to us about money?"

Check or write your top 3:

☐ Freedom

☐ Security

☐ Travel

☐ Simplicity

☐ Legacy

☐ Giving

☐ Growth

☐ Balance

☐ Experiences

☐ Peace of Mind

 Add Your Own: \_\_\_\_\_

### 2. Life Milestones We Want to Achieve Together


Write or illustrate your shared dreams under each timeline:


 Short-Term (0–2 Years):


 Buy Our First Home

 Take a Dream Vacation


 Build Emergency Fund

 Upskill / Take a Course Together

 Mid-Term (3–7 Years):

 Plan for a Child


 Start Kid's Education Fund


 Move to a Bigger Space

 Buy Our Dream Car

 Start a Business Together

 Long-Term (10+ Years):

 Travel the World

 Financial Freedom Fund

 Retire Early & Peacefully



- Create a Will / Legacy Plan
- Give Back / Start a Foundation

### 3. Our Money Goals Visualized (Use Icons or Paste Images)

- Dream House Style
- Ideal Travel Destinations
- Car / Bike of Choice
- Savings Target Chart
- Dream Celebration (Anniversary, Festival, etc.)
- Family Experiences (spa day, picnic, movie nights)

### 4. Our Couple Money Mantras (Affirmations)

Examples:

- “We plan with love and spend with joy.”
- “Every rupee we save brings us closer to our dream.”
- “We are building a rich and peaceful life together.”
- “Our money works for us—so we can live fully and freely.”

### 5. Our Accountability & Rituals

Weekly Check-In Day: (circle one) Mon / Wed / Fri / Sun

- ☒ Review Our Budget
- ☒ Track Our SIPs & Investments
- ☒ Celebrate Small Wins
- ☒ Adjust Next Week’s Goals

### 6. Our Joint Decision Code

Before we spend above ₹\_\_\_\_\_, we promise to:

- ☒ Discuss it openly
- ☒ Sleep on it for 24 hours
- ☒ Align it with our bigger goals

### 7. Completion Badge

When completed, sign your names and add the date.



Partner 1: \_\_\_\_\_

Partner 2: \_\_\_\_\_

Date of Completion: \_\_\_\_\_

Bonus Tip:

Take a selfie with your completed board and place it inside the board or on the corner. Visual proof of your commitment!