

## **Mind and Money: Connecting Mental Health and Financial Well-Being**

### **Webinar Additional Resources**

Webinar Learn Page : <https://oneop.org/learn/160019/>

### **Family Financial Questionnaire**

The following questions can serve as a guide to exploring the history and emotional significance of money for a client.

1. What are your earliest memories of money in your family? What is your best and worst memory regarding money? What feelings do these memories generate? Was money viewed as good, bad, scary, dirty, or neutral for you as a child? Did anyone help you to understand these feelings as a child? Were there any family stories about money?
2. How did your parents talk about money between themselves and with the children? Was it easy to talk about, or was it treated as a secret? What kind of tone was used in the discussions? Did your parents fight about money, and if so, how?
3. Did your parents agree about how to deal with money? Who was in charge of spending, and who was in charge of saving? Did working, or earning the bigger portion of the income, connect to control over money?
4. How did your mother think and feel about, and deal with, money? How did her parents think and feel about, and deal with, money? Did your mother enjoy working (or staying home)? How did you know and what impact has this had on you? Repeat using father. How well off did you feel growing up? How did that change over the course of your growing up, if at all?
5. What is your first memory of having an argument or disagreement about money in your family? What were your feelings regarding arguments about money, and how has this impacted you?

6. If you have siblings, were different genders or different ages treated differently in regard to money? How are your attitudes and feelings about money different from or the same as those of your siblings?
7. What is your first memory of making money of your own? How much control did you have over any money you made or received as a gift?
8. Where else did you get messages or information about money while growing up? Other relatives, religion, peers, TV, culture? How did these messages influence you?
9. What financial expectations did your parents and grandparents have of you? How was this communicated to you? What financial expectations do you have of your parents or grandparents?
10. What would you like to do differently from your parents regarding money in your relationship? What would you like to do the same?

**Adapted from:** Shapiro, M. (2007). Money: A therapeutic tool for couples therapy. *Family Process*, 46(3) p. 280-281.

**Presented by:** Ross, D.B. III, (2024, March). *Mind and Money: Connecting Mental Health and Financial Well-Being*. Webinar Session: OneOp Presentation.