

MODULE 8 — FINANCIAL BOUNDARIES

Managing Money and Extended Family Obligations Worksheet

INSTRUCTIONS: Complete this worksheet individually, then discuss your answers with your spouse. Be honest about what you have observed, not what you wish were true.

1. FINANCIAL REQUESTS & OBLIGATIONS

Has your spouse given money to family members? How much? How often?

Do requests come regularly, or sporadically? Are they for emergencies or daily expenses?

What happens if your spouse says no to a financial request from family?

2. PARENTAL SUPPORT

Do you or your spouse contribute to your in-laws' living expenses, healthcare, or retirement?

Was this decision made jointly, or did your spouse assume this obligation?

What are the expectations about long-term financial support?

3. FINANCIAL DECISION-MAKING

Who decides whether money goes to family? Just your spouse, or both of you together?

Do financial requests create conflict in your marriage?

Have you set limits on how much of your marital finances can go to extended family?

4. TRANSPARENCY & SECRETS

Do you know about all financial transactions with extended family members?

Has your spouse given money to family without telling you?

Are you aware of ongoing financial obligations to in-laws?

5. LONG-TERM FINANCIAL PLANNING

How will extended family financial obligations affect your retirement, children's education, or future goals?

Have you discussed limits on financial support to family?

What happens if your spouse's family members have a financial crisis?

KEY REFLECTION: How are extended family financial obligations affecting your marriage finances?

What boundaries do you need to set together to protect your financial future?