

ACTION RESET: RE-ENGAGE TOGETHER

If your quiz results show signs that new habits are starting to fade or that conflict is resurfacing, this reset exercise helps you get back on track by allowing you to regroup and recalibrate your communication approach.

Step 1: Switch Roles

- The partner who tends to defer takes charge of this reset exercise, even if it feels uncomfortable.
- The partner who usually takes the lead steps back.

Step 2: Each Share One Win

- Each partner names one thing they've done well in their financial conversations so far.
- Keep it positive and specific. ("I like how you explained our savings plan clearly," or "I'm proud that I asked more questions last week.")

Step 3: Each Share One Gap

- Each partner names one area where they'd like more balance.
- Keep it positive and specific. ("I want to understand our retirement accounts better," or "I'd like you to ask me to explain things more often.")

Step 4: Pick One Micro-Change

Together, decide on one small adjustment for your next check-in that keeps both of you engaged.

Examples:

- Rotate who sets the agenda.
- The quieter partner asks at least one question.
- End each meeting with both partners naming one takeaway.

Step 5: Commit Out Loud

Say your agreement out loud to each other before ending the exercise. That small act of verbal commitment actually anchors the intention in your brain and in your relationship. Research shows that speaking your intentions activates memory and motivation, and when both partners hear the commitment, it strengthens accountability and your shared resolve.

I've made it very easy for you to speak your intentions out loud. Here is a menu you can reference if you get stuck for ideas.

1. "We agree to take turns leading our check-ins so both of us stay engaged."
2. "We agree that each of us will bring at least one question to every check-in."
3. "We agree to end each check-in by naming one takeaway or next step."
4. "We agree to gently call it out if one of us starts to take over or check out."
5. "We agree to review our progress together once a month, not just leave it to one of us."
6. "We agree to keep all financial documents in a place where we both can access them."
7. "We agree to remind each other why we're doing these check-ins and why it's important."

You are fully committed to each other and ready to hit the road. You are setting off on a journey of clear communication based on honesty and transparency. You have developed the skills, practiced the conversations, and built new habits.

Think of your financial life as a road trip. You don't just hop in the car and hope for the best. Traveling well is more than knowing where you are headed. You need to plan the route, check the oil, fill the tank, and decide where you'll stop to rest. You need to know what to expect and be prepared. That's why you never leave without the ever-important map (a functioning GPS works too).

The next section of this guidebook will help you get organized and be prepared. Happy trails!