

FINANCIAL ROLE QUIZ: ARE YOU THE LEAD OR THE LEARNER?

For each statement below, answer Yes, No, or Unsure.

1. I regularly monitor our household spending and account balances.

Yes

No

Unsure

2. I know where all our key financial accounts and documents are stored.

Yes

No

Unsure

3. I take the lead in making or executing financial decisions (paying bills, planning budgets, handling investments).

Yes

No

Unsure

4. If something happened to me, my partner would know how to access everything.

Yes

No

Unsure

5. I feel confident talking about money, including goals, fears, and plans.

Yes

No

Unsure

6. I've explained or shared financial information with my partner recently.

- Yes
- No
- Unsure

7. I take the initiative when it's time to review our financial situation or make changes.

- Yes
- No
- Unsure

8. I can easily list all of our current debts and assets.

- Yes
- No
- Unsure

9. I know how to read our bank or investment statements.

- Yes
- No
- Unsure

10. I feel comfortable guiding financial conversations in our relationship.

- Yes
- No
- Unsure

Scoring Guide

If you answered Yes to 7 or more questions, you're likely the Financial Lead Partner; you currently have more financial knowledge and/or responsibility.

If you answered Yes to fewer than 7 or had multiple Unsure answers, you're likely the Financial Learner Partner. Finances have not been your focus in the relationship.

This quiz is meant to start a conversation, not permanently define your role.