

# PERSONAL INSIGHTS ABOUT MONEY



MOSAICWEALTH  
MANAGEMENT GROUP

Name \_\_\_\_\_

Date \_\_\_\_\_

**Directions:** Look for clues in your past that will help you to understand your current financial life. Starting with your childhood, what experiences have shaped your underlying beliefs and attitudes about money? What do your patterns of earning, saving, investing, and giving tell about you? Here is a list of questions to guide you in this reflection process.

As a child, my mother (or guardian) taught me that money...

As a child, my father (or guardian) taught me that money...

The first time I earned money, I felt...

In my youth, my biggest concern about money was...

Today, my biggest concern about money is...

For me, talking about money is difficult when...

In my financial life, I am most satisfied when...



1500 Town Plaza Court | Winter Springs, FL 32708 | MOSAIC-WEALTH.COM

Where Money Intersects Life

ph 407.622.7526  
fax 866.386.7525